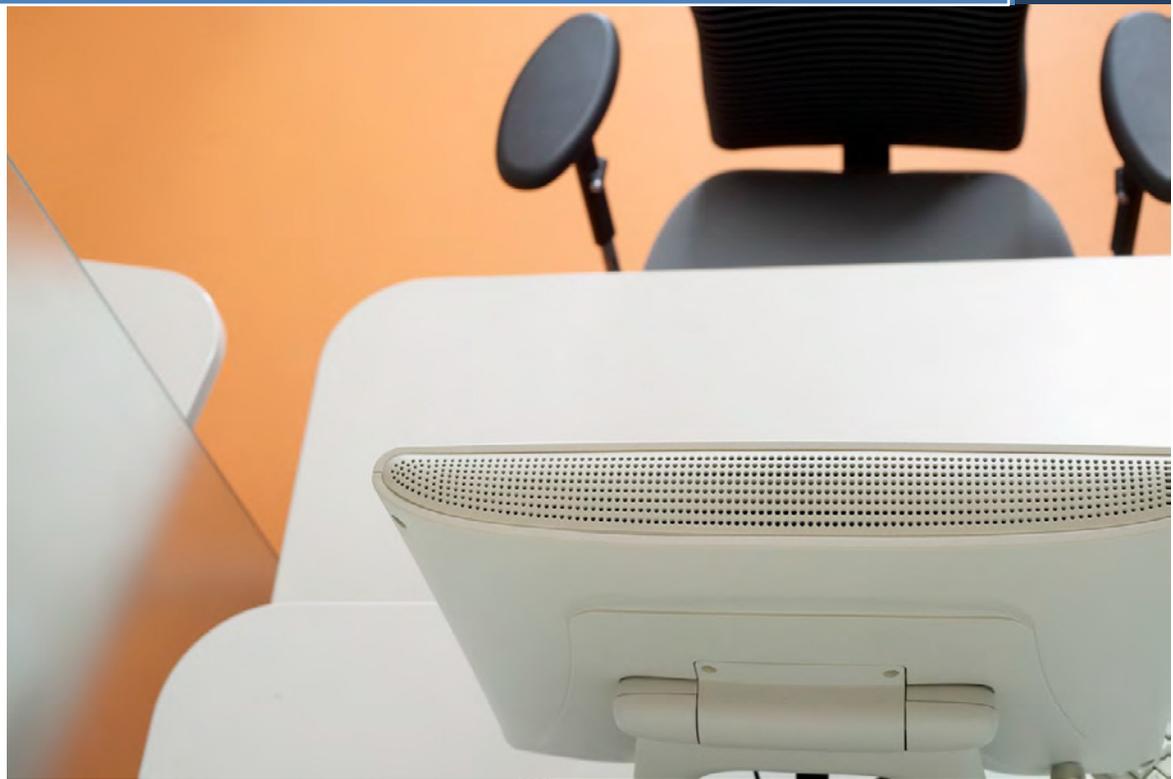


HHS Learning Portal

Learning Administrator



NIH Training Center
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Bethesda, MD 20817

HHS LEARNING PORTAL

LEARNING ADMINISTRATOR

Version 6.0



National Institutes of Health Training Center

National Institutes of Health Training Center, Bethesda 20817

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Please submit any questions or suggestions for changes to https://nihohrweb.nih.gov:1010/WiTS_IntraHR/index.aspx.

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LEARNING ADMINISTRATOR

INTRODUCTION

HHS Learning Portal/LMS: These terms are used interchangeably and refer to the same system. The Learning Management System (LMS) is a Department-wide system for managing, accessing, and tracking training. As a Department-wide system, the overall LMS is managed at the HHS level – hence the name HHS Learning Portal. The following are some concepts and terms you should understand before beginning to perform administrative tasks in the LMS.

LEARNER PROFILE

The Learner Profile contains information about the learner such as employee status, start date, name, and organization. The profile does not contain personally identifiable information (PII) such as the employee's social security number or date of birth.

The Learner Profile receives data from the following sources on a nightly basis:

- NIH Enterprise Directory (NED)
- Capital HR
- Commissioned Corp Personnel Database

Anyone given an NIH Enterprise Directory (NED) account will automatically be given an LMS account. Due to the nightly updates, all data changed in the learner profile will be overwritten, with the exception of the learner e-mail and manager fields and account code.

The Learner Profile fields with which you should be most concerned are:

- **E-mail:** Accurate email addresses in the LMS will ensure learners receive notifications generated by the LMS.
- **Manager:** Manager data is generated by the last timecard approved for all Federal employees. Non-Federal employees do not have managers assigned however they can be updated by Local Learning Registrars and People Administrators.
- **Organization:** LMS learner accounts are grouped in the system according to Organization/SAC Code. (See Appendix A.) Errors in this data must be corrected in the HR system for the learner. Once the data is updated in the HR system, it will be updated in the LMS the following day.

SECURITY DOMAINS

Security Domains in the LMS are used to segment users into hierarchical groups of people who should all have the same basic security permissions. The HHS Learning Portal is comprised of many domains; some of which are strictly dedicated to NIH, its staff and learning resources. (See Appendix C for a graphic depiction.)

These domains allow for the partitioning of the following components that may be managed by various administrator security roles:

<i>Component</i>	<i>Example...</i>
Business rules	NIH offerings with tuition require manager approval prior to registration confirmation.
Notifications	NIH email notifications include NIH-specific information and logos.
Locations, facilities, and rooms	NIH resources are only available to NIH administrators in the LMS.
User accounts	Only NIH administrators may access and modify the accounts of NIH staff.

NIH has its own domain to ensure that all NIH employees and contractors have access to NIH-specific training resources. Having an NIH domain also prevents users in other domains (other agencies within HHS) from viewing and accessing NIH-specific training resources.

LMS users are unable to see information in domains that are at a higher or equal level in the hierarchy. Their permissions trickle down, which means they can see items in their own domain and sub-domains only.

The following are all sub-domains of the NIH domain:

- NIH Training Center (NIHTC)
- Clinical Center (CC)
- Center for Information Technology (CIT)
- Office of Research Services (ORS)
- National Institutes of Allergy and Infectious Diseases (NIAID)
- NIH Common

For a graphic representation of the HHS Learning Portal domain structure please refer to [Appendix C](#) of this document.

SECURITY ROLES

Security Roles further define the permissions of individual users in a security domain. Most of the security roles in the LMS are 'tied' to the domain (e.g., a user assigned the Learning Administrator security role at the NIH domain has permission to manage NIH courses, as well as everything in NIH sub-domains).

Every user in the LMS has the Learner security role. If a learner designated as the Manager in someone's LMS profile, they will automatically have the role of Manager/Supervisor assigned to them.

Domain-Specific Security Roles include:

- Learning Administrator
- Content Administrator
- Domain System Administrator
- People Administrator

There is one Security Role that is defined by Organization/SAC code instead of the domain which is the Local Learning Registrar (LLR). This restricts the LLR to performing actions associated with learners within a specific organization or SAC code.

LEARNING ADMINISTRATOR ROLE

The LMS Learning Administrator role is for those who manage courses, offerings, resources, certifications, and curricula. With Learning Administrator privileges you will be able to do the following:

- Create/edit locations, facilities, rooms, equipment, and inventory items
- Create/edit courses
- Create/edit offerings
- Create/edit catalog categories
- Manage a roster
- Manage learning requests
- Register learners for offerings
- Place orders for multiple learners
- View enrollments, curricula, certifications and/or courses assigned to others
- View and edit transcripts for other learners
- Add external learning to transcripts
- Create/edit certifications and curricula
- Generate various reports

This user manual will guide you through the process of using the privileges assigned to you as a Learning Administrator.

LMS TERMS AND DEFINITIONS

Audience Types - Audience Types are used to group learners in the system. Similarly, Audience Sub-Types allow for the further grouping of learners within an Audience Type.

These groups can then be used to control access to learning offerings in the LMS:

- by associating audience types and subtypes at the course level
- by attaching audience types with seat percentages at the delivery type level
- by specifying seat numbers for audience subtypes at the offering level.

Certification – A predefined set of courses that have been grouped together, with a deadline for completion. Credentials earned by completing the certification may expire on a predetermined date.

Closing a Competency Gap – A competency gap can be closed by increasing the calculated gap number to zero or higher. Closing the gap can be accomplished by completing or updating a learner self-assessment, or a manager/supervisor assessment, usually after relevant training has been completed or additional experience has been gained.

Competency – A competency is a skill, knowledge, or behavior that can be measured, calculated, acquired, specified, or tested. Examples of competencies include “Java Programming”, “Written Communications”, “Product Knowledge”, and “People Skills”. Assigned competencies “required” and assessed competencies are “held.”

Competency Gap – This is a measure of the learner’s current competency proficiency minus his/her required competency proficiency level. This value indicates how much training, development, and learning is needed in order to make measurable increases to performance.

Course – A course is organized training with planned objectives for learners to complete. Courses may be offered using a variety of delivery types and may have multiple offerings.

Curriculum – A predefined set of courses that have been grouped together. A learner must complete all courses to complete the curriculum.

Delivery Type – A delivery type is the method through which the course content will be presented to learners. Some examples of delivery types are: Online Training, Traditional Classroom, Books, Video, and Webcast.

Descriptors – Behavioral descriptors are descriptions associated with competency proficiency levels. They are intended to help establish an anchor that raters and viewers can use when assessing the proficiency level of a learner.

Enrollment – An offering that a learner is registered for, but has not yet completed.

Facility – A facility is the actual building at a specific location. An example would be Building 31, which is part of the NIH Main Campus location.

Job Families – A job family is a collection of related jobs.

Job Roles – Roles identify specific skills required to perform a job. Roles can be shared across multiple jobs. Role definitions may include:

- Competencies — competencies required to perform the role (including criticality of the competency and minimum required proficiency)
- Certifications — certifications required to perform the role.
- Curricula — curricula required to perform the role.
- Attachments — additional information about the job role.

Jobs – In the LMS, jobs are listed according to the OPM job series number. A job can be a collection of roles. It can inherit the competencies, certifications, curricula and attachments of the associated roles. Job definitions may include:

- Roles — define the functional responsibilities for the job.
- Next career steps — other jobs that represent likely promotion paths for people who hold the job.
- Attachments — additional information about the job function.

Learning Plan – Learning plans allow learners to keep track of learning offerings and other tasks needed for general development. Every LMS learner has a single learning plan. Learners can set or view the progress of each item in their learning plan. In addition, users with certain privileges (like managers) can also view progress on the learning plan items.

Location – A location is either a geographic location, such as Bethesda, or the name that serves as an identifier, such as NIH Main Campus.

Multi-Rater Assessment (MRA) – A multi-rater assessment (MRA) is a method by which a learner's competencies are assessed by supervisors, peers, subordinates, and customers.

Offering – An offering is the specific date and time a course will be presented to learners. In most cases, offerings are limited to specific dates, times, locations, facilities, and rooms. The exception would be self-paced courses, such as online training, where the offering is available to the learner at any time. Offerings are often referred to as classes.

Order – An order is created when an administrator signs another person up for an offering.

Prescriptive Rule – Prescriptive rules are used to dynamically assign goals or learning (offerings, courses, certifications, curricula, etc.) to people as a group. Prescriptive rules are defined to assign the prescribed goals/learning.

Proficiency Level – Proficiency levels represent the scale on which a competency is measured. Examples of the proficiency levels used at NIH include “Fundamental Awareness”, “Novice”, “Intermediate”, “Advanced”, and “Expert”.

Ratee – The employee whose competencies are being rated.

Rater – An individual who is completing a competency assessment of someone else.

Registration – A registration is created when a learner signs up for an offering.

Room – A room is a designated space, such as a conference room, classroom, or auditorium, found within a specific facility. An example would be Conference Room A in Building 31.

Security Role – A security role is a set of privileges assigned to a user. A user can be a learner, a manager, an alternate manager, a registrar, an instructor, or an administrator. The permissions granted to a user through a security role apply to the specified domain.

Session Template – A session template is a general format used to show the learner when a course is being offered. Session templates should contain the day and time the offering will be held. Examples of session templates are:

- Mon 9 – 11
- Mon - Wed 9 – 5
- Mon, Wed, Fri 1 – 4:30

Surveys – A survey is a questionnaire that a respondent uses to evaluate a service or provide general feedback.

Transcript – a record or history of training taken by a learner.

CATALOG CONFIGURATION

CATEGORIES

Categories are used to group courses so that learners can find them easily when searching the catalog by category. It is beneficial for your IC to have its own category. Subcategories can be created to further organize courses into logical groups.

CREATING CATEGORIES

1. Select the **Admin Icon**.



2. Select **Categories** in the left navigation menu.

3. Click the **New Category** link.

Categories

Name Domain

[Configure](#) | [Save Search Query](#)

Categories [New Category](#)

4. In the **Name field**, enter the name of your category.

5. In the **Description field**, enter a brief explanation of the types of courses that will be found in the category. (optional)

6. From the **Parent Category field**, select the category under which you want your category to appear in the catalog (e.g., “01 – NIH Courses”).

NOTE: It is recommended that new categories have the “01 – NIH Courses” category as their parent category. This will ensure that your courses will be found when a learner browses the LMS catalog for all NIH related training.

7. Click the **Save button**.

New Category

Name*

Description

Disable Category

Parent Category

Domain*

Category Deeplink URL

8. Click the **Add Owner** link.

Category Details: Sample Category

Name*

Description

Disable Category

Parent Category

Domain NIH

Category <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/BrowseCategoryURL?categoryId=nlfd000000000031106&isTop=false>

Deeplink URL [categoryId=nlfd000000000031106&isTop=false](https://test.learning.hhs.gov/Saba/Web/Cloud/goto/BrowseCategoryURL?categoryId=nlfd000000000031106&isTop=false)

Owner → Add Owner

No items found

9. Enter search criteria for an owner and click the **Search** button.

10. Click the **checkbox** associated the owner's name.

11. Click the **Select** button.

12. The owner will now be displayed on the **Category Details** screen.

Search Person, Internal

Supervisors: you can easily display all of **your staff** by entering your **login ID** into the "Manager" field, clicking the **Magnifying Glass** graphic, and then clicking the "Search" button.

Population* First Name

Last Name Person ID

Username Manager

Organization Location

Domain Person Type

Security Roles Include All Suborganizations

→

People Print | Export

Showing 1 out of 1 results

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	NIH	LearningAdmin	NIHLEARNINGADMIN	Other	00165951	HNAM6		NIHMANAGER

→

NOTE: You may disable a category at any time by clicking the **Disable Category** checkbox.

Category Details: Sample Category

Name*

Description

Disable Category

Parent Category

Domain NIH

Category <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/BrowseCategoryURL?categoryId=nlfd00000000031106&isTop=false>

Deeplink URL categoryId=nlfd00000000031106&isTop=false

Owner [Add Owner](#)

Name	Actions
NIH LearningAdmin	Delete

NOTE: You may delete an owner at any time by clicking the **Delete** link in the Actions column.

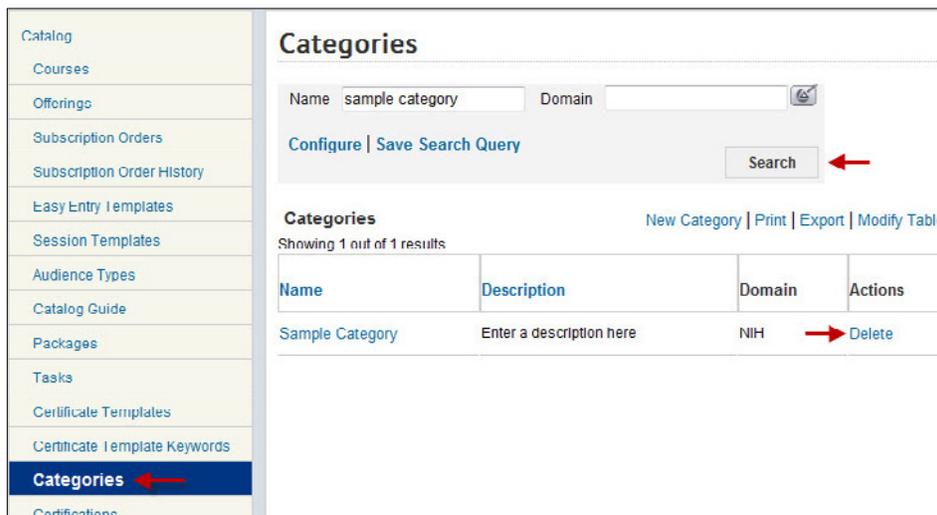
13. Click the **Save** button.

DELETING CATEGORIES

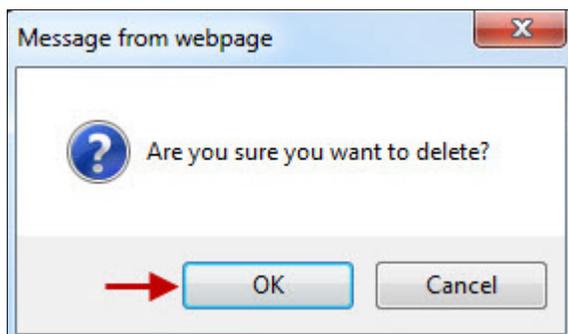
1. Select the **Admin Icon**.



2. Select **Categories** in the left navigation menu.
3. Enter the name of the category in the **Name field**.
4. Click the **Search** button.
5. Click the **Delete** link in the Actions column.



6. Click **OK** in the confirmation popup.



7. The category is now deleted.

IMPORTANT! It is recommended that you disable categories that you don't wish to use rather than delete them. Other courses that you are unaware of may also use the category.

MANAGING RESOURCES

LOCATIONS

Locations are used in the system primarily to deliver learning in your education services operation and optimize the use of learning resources in your organization. Use locations to define places where scheduled offerings are delivered and where resources are located.

Locations are required for instructor-led training, and identify the places where scheduled learning offerings (i.e. classes) are delivered. Locations must be assigned to all instructor-led scheduled offerings. The locations must be set up in advance, prior to creating and assigning them to scheduled offerings. Please search for and modify existing locations before creating new ones.

Some examples of locations are:

NIH Training Center

Center for Information Technology

Your IC...?

Document the names of the locations, facilities, and rooms that you are using so you can find them later.

CREATING LOCATIONS

1. Click the **Admin Icon**.



2. Click the Resources **link**.

Catalog

- Courses
- Offerings
- Subscription Orders
- Subscription Order History
- Easy Entry Templates
- Session Templates
- Audience Types
- Catalog Guide
- Packages
- Tasks
- Certificate Templates
- Certificate Template Keywords
- Categories
- Certifications
- Curricula
- Blended Programs
- Resources
- Continuing Education Plans

Courses

Title Course ID

Domain Audience Type/Subtype

Configure | Save Search Query Search

Course New Course |

3. Click the **Locations** link.

Catalog

- Resources
- People
- Locations
- Facilities
- Rooms
- Equipment
- Equipment Categories
- Inventory
- Inventory Categories
- Continuing Education Plans
- Learning Administration
- Legacy Assessments
- Knowledge Base
- Production Repository
- Content Tools
- Pricing
- Reports

People

Population* Internal Person ID

Username Manager

First Name Last Name

Organization Location

Role Job

Audience Type Domain

Competency Proficiency Level

Certification Certification Status

City State

Country Include All Suborganizations

Configure | Save Search Query Search

People

4. Click the **New Location** link.

Catalog
Resources
People
Locations
Facilities
Rooms
Equipment
Equipment Categories
Inventory
Inventory Categories
Continuing Education Plans
Learning Administration
Legacy Assessments
Knowledge Base
Production Repository
Content Tools
Pricing
Reports

Locations

Name

Configure | Save Search Query

Locations → [New Location](#)

5. Enter all available information for the new location then click the **Save** button.

New Location

Number

Name*

Enabled

Location Type*

Address 1

Address 2

City

State

Zipcode

Country

Administrator

Phone 1

Phone 2

Email

Fax

Department ID

Domain*

TimeZone*

Other Information

Description

→

NOTE: All fields in **RED** are required to save.

6. The screen will refresh displaying the Related Info tab and the Owner section.

Location Details: Sample Location

Main | **Related Info**

Number: 00014737

Name*: Sample Location

Enabled:

Location Type*: Learning

Address 1: 1000 Main Street

Address 2:

City: Bethesda

State: MD

Zipcode: 20785

Country: US

Administrator: NIHLEARNINGADMIN 

Phone 1: 301-435-1000

Phone 2:

Email: sample@nih.gov

Fax:

Department ID: 

Domain*: NIH 

TimeZone*: (GMT-05:00) Eastern Time (US & Canada)

Owner → [Add Owner](#)

No items found

Other Information

Description:

ADDING AN OWNER TO A LOCATION

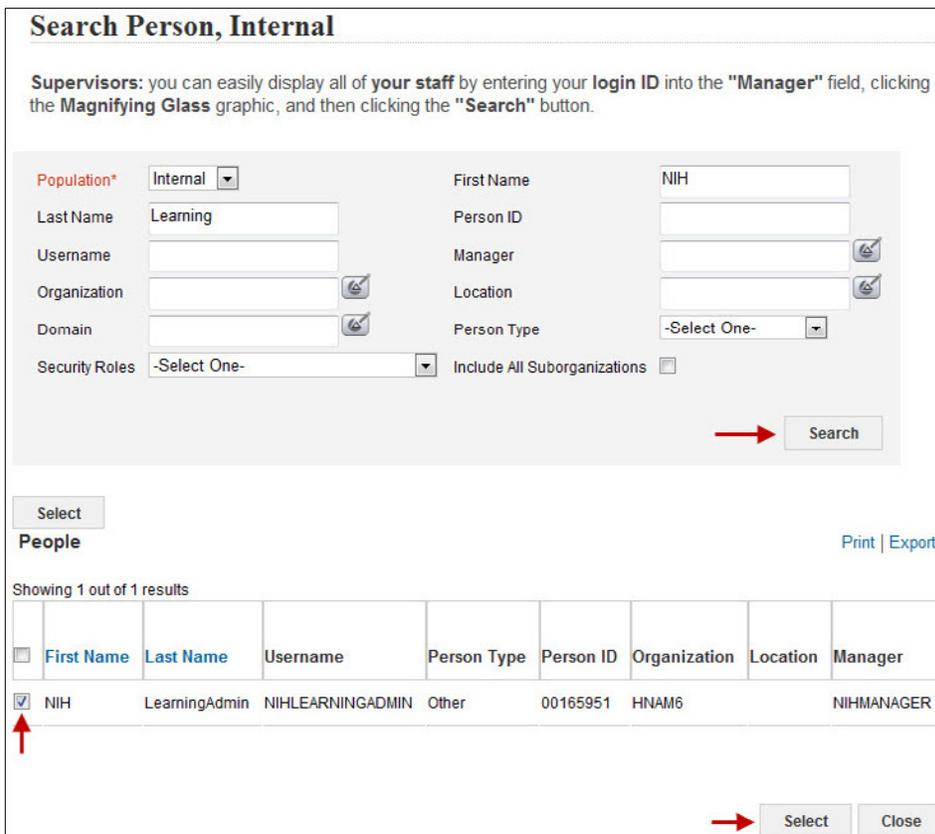
1. After saving the location, click the **Add Owner link** to add the person responsible for managing the location.



Owner [Add Owner](#)

No items found

2. Enter the search criteria for the owner and click Search.
3. Click the Checkbox next to the name of the owner.
4. Click the Select button.



Search Person, Internal

Supervisors: you can easily display all of **your staff** by entering your **login ID** into the "Manager" field, clicking the **Magnifying Glass** graphic, and then clicking the "Search" button.

Population* First Name

Last Name Person ID

Username Manager

Organization Location

Domain Person Type

Security Roles Include All Suborganizations

People Print | Export

Showing 1 out of 1 results

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	NIH	LearningAdmin	NIHLEARNINGADMIN	Other	00165951	HNAM6		NIHMANAGER

5. The owner will now appear at the bottom of the Location Details screen.

NOTE: You may delete an owner by clicking the **Delete link** in the Actions column for the appropriate owner.



Owner [Add Owner](#)

Name	Actions
NIH LearningAdmin	Delete

NOTE: You may add multiple owners by repeating these steps.

ADDING ATTACHMENTS TO LOCATIONS

1. Click the **Related Info** tab.

Location Details: Sample Location

Main **Related Info**

Number 00014737

Name*

Enabled

Location Type*

Address 1

Address 2

City

State

Zipcode

Country

Administrator 

Phone 1

Phone 2

Email

6. Click the **Add Attachment** link.

Location Details: Sample Location

Main **Related Info**

Attachments [Add Attachment](#)

No items found

Notes [Add Notes](#)

No items found

7. **Attachment Name** - Enter a name for the attachment in this field.
8. **Type** - Select the radio button that describes the type of attachment.
9. **URL** – enter a valid URL for the website.
10. **File** – Click Browse to search your computer for the file to be attached.
11. **Category** - Select a Category for the attachment from the pull-down menu.
12. **Locale** – This should be set to English which is the default setting.
13. **Is Private** – Check this checkbox if you would like to restrict visibility of the attachment to users registered for an offering at the location.

14. Click the **Save** button.

New Attachment

* = required

Attachment Name*

Type * URL
 File

Category*

Locale*

Is Private



Your attachment will now appear on the Location Details screen.
Click the **Attachment Name** link to open it and verify that the file/URL works properly.
Click the **Edit Attachment** link in the Actions column to return to the attachment details and make changes.
Click the **Delete Attachment** link in the Actions column to remove the attachment from the location.

Location Details: Sample Location

Main **Related Info**

Attachments Add Attachment | Print | Export

Attachment Name	Type	Category	Locale	Private	Actions
NIHTC Website 	URL	Website	English	No	Edit Attachment  Delete Attachment 

NOTE: You may add as many attachments as needed by repeating these steps.

ADDING NOTES TO LOCATIONS

1. Click the **Add Notes** link.

Location Details: Sample Location

Main **Related Info**

Attachments [Add Attachment](#)
No items found

Notes [Add Notes](#)
No items found

2. Select a Category for the note from the **Category drop-down menu**.
3. Enter the note in the **Notes field**.
4. Click the **Save** button.

New Note

Category* Administrative

Notes* This location belongs to NIH.

[Save](#) [Close](#)

5. Notes will appear on the **Related Info** tab of the Location Details screen.

Location Details: Sample Location

Main **Related Info**

Attachments [Add Attachment](#)
No items found

Notes [Add Notes | Print | Export | Modify Table](#)

Created by	Created On	Note
NIHLEARNINGADMIN	02/19/2015	This location belongs to NIH.

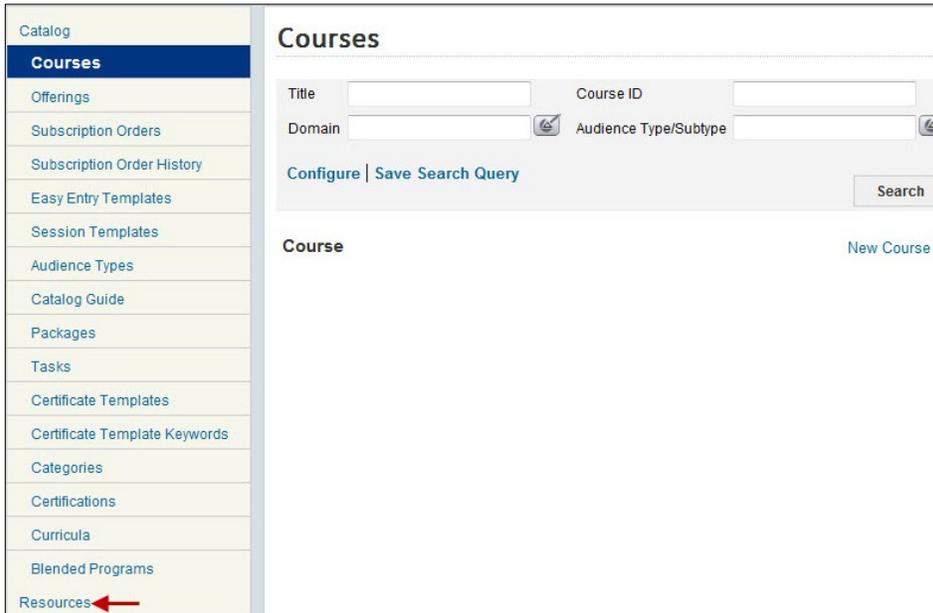
NOTE: Notes are permanent and cannot be deleted or edited. You may add additional notes as needed.

MODIFYING LOCATIONS

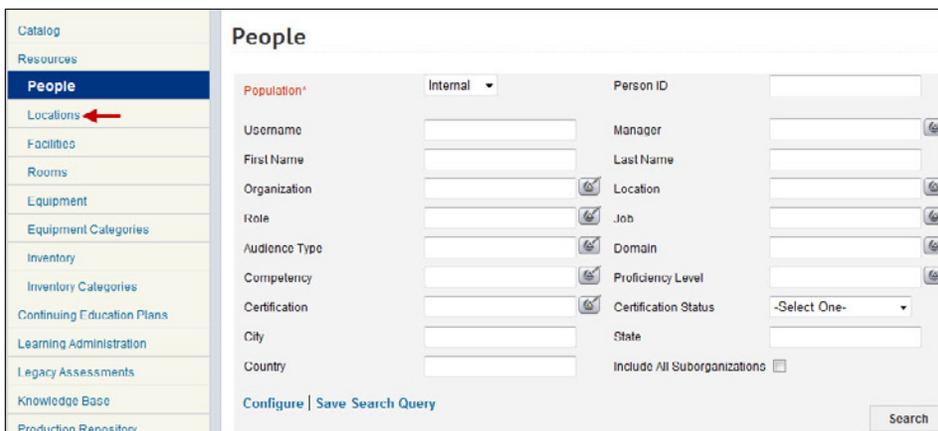
1. Select the **Admin Icon**.



2. Click the **Resources** in the left menu.



3. Select **Locations** in the left navigation menu.



4. Enter the name of the location in the **Name** field.
5. Click the **Search** button.
6. Click the **location name**.

Catalog

- Resources
- People
- Locations**
- Facilities
- Rooms
- Equipment
- Equipment Categories
- Inventory
- Inventory Categories

Locations

Name

[Configure](#) | [Save Search Query](#)

Locations [New Location](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

Name	City	Administrator	Phone 1	Email	Fax	Location Type	Actions
Sample Location	Bethesda	NIHLEARNINGADMIN	301-435-1000	sample@nih.gov		Learning	Delete

7. Modify the location details as needed then click the **Save** button.

Location Details: Sample Location

Main | **Related Info**

Number: 00014737

Name*:

Enabled:

Location Type*:

Address 1:

Address 2:

City:

State:

Zipcode:

Country:

Administrator:

Phone 1:

Phone 2:

Email:

Fax:

Department ID:

Domain*:

TimeZone*:

Owner [Add Owner](#)

Name	Actions
NIH LearningAdmin	Delete

Other Information

Description:

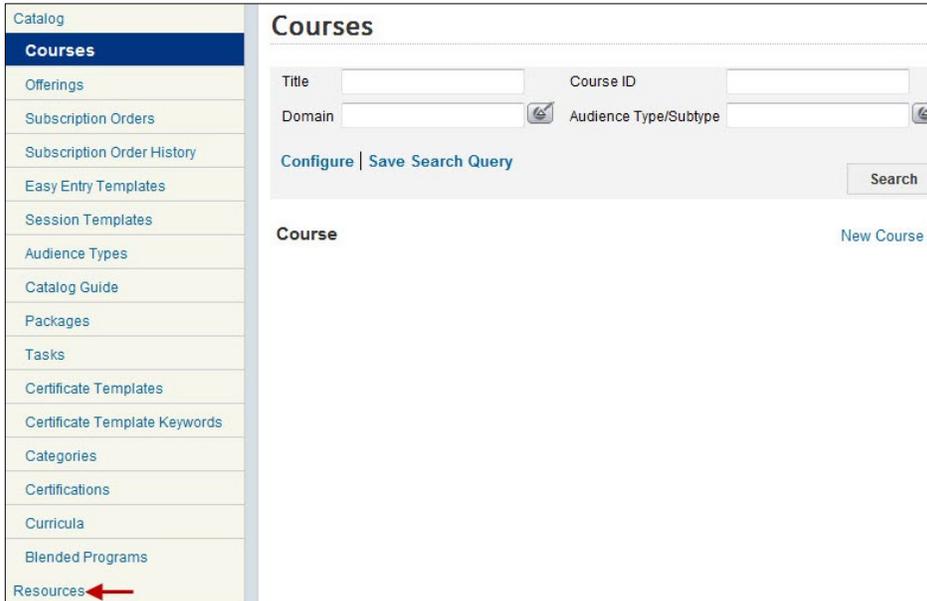
DELETING LOCATIONS

IMPORTANT! You should only delete Locations that you created. Once a location is associated with an offering or delivery type, the location cannot be deleted until that relationship is broken.

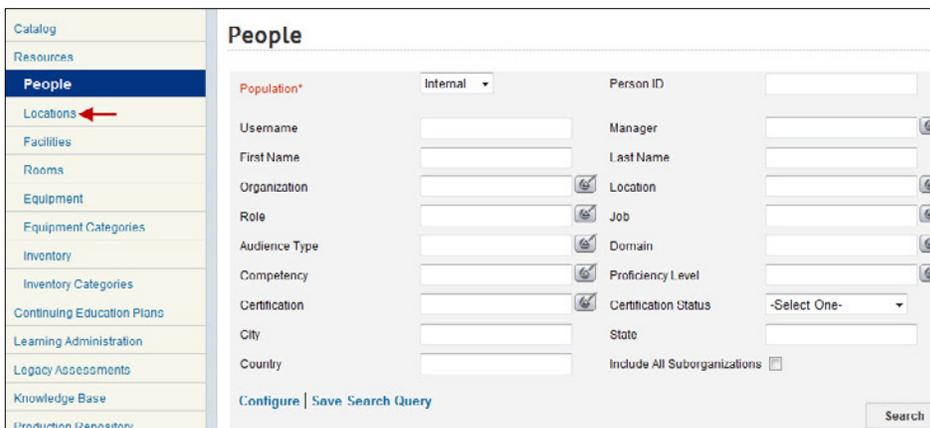
1. Select the **Amin Icon**.



2. Click the **Resources** in the left menu.



3. Select **Locations** in the left navigation menu.



4. Enter the name of the location in the **Name** field.
5. Click the **Search** button.
6. Click the **location name**.

Locations

Name: Sample Location

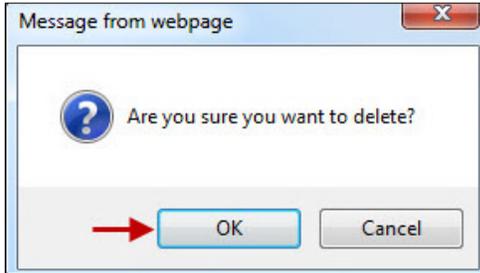
Configure | Save Search Query | Search

Locations New Location | Print | Export | Modify Table

Showing 1 out of 1 results

Name	City	Administrator	Phone 1	Email	Fax	Location Type	Actions
Sample Location	Bethesda	NIHLEARNINGADMIN	301-435-1000	sample@nih.gov		Learning	→ Delete

7. Click **OK** in the confirmation dialog box.



8. The location is now deleted from the LMS.

NOTE: If you cannot delete a location because it has been associated with an offering, you can alternatively disable the location so it can no longer be used.

Disable a location: In step 6, click the title of the location, then uncheck the Enable checkbox on the Location Details screen.

Location Details: Sample Location

Main | Related Info

Number: 00014737

Name*: Sample Location

Enabled: →

Location Type*: Learning

6. Click the **Save button** at the bottom of the page.

FACILITIES

Facilities are the actual buildings or units used to deliver scheduled offerings associated with a location. The facilities contain the rooms that will be used to hold the training classes. The facilities must be set up in advance, prior to creating and assigning them to scheduled offerings.

IMPORTANT! You must assign facilities to locations in order to be able to use them.

IMPORTANT! Please search for and modify existing facilities before creating new ones.

Some examples of Facilities at NIH are:

Building 31 (NIH Main Campus)

Parklawn Building (Fishers Lane – Bethesda, MD)

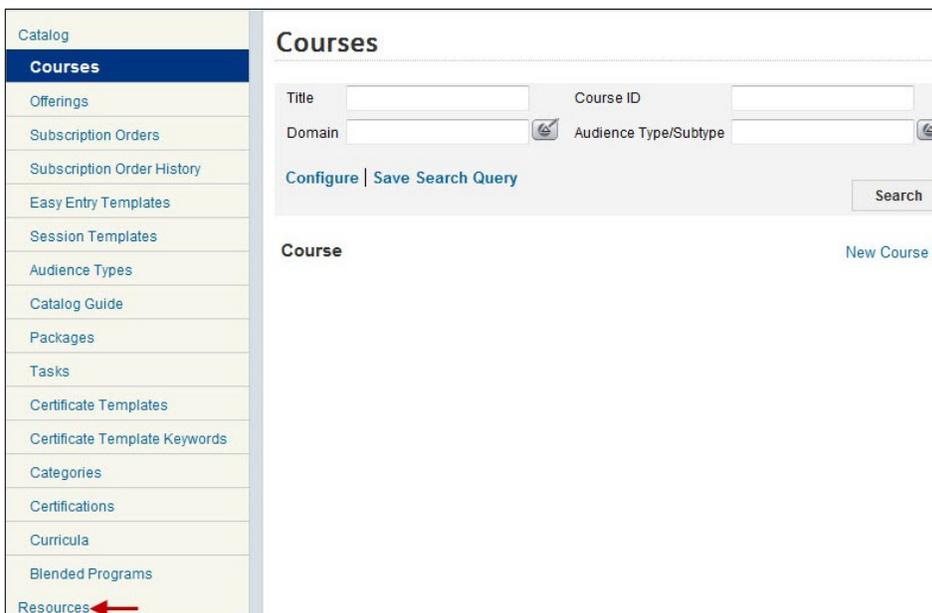
Document the names of the locations, facilities, and rooms that you are using so you can find them later.

CREATING FACILITIES

1. Select the **Admin Icon**.



2. Click the **Resources** in the left menu.



3. Select **Facilities** in the left navigation menu.

7. Click the New Facility link.

8. Enter all available information for the new facility.

9. The **Domain** field should be set to **NIH**.

10. Click the **Save button** at the bottom of the screen.

NOTE: All fields in **RED** are required to save.

New Facility

Facility Number

Name* Sample Facility

Administrator* Facility Manager

Contact Phone 301-435-5000

Contact Fax 301-435-1212

Contact Email Facility@nih.gov

Address 1 1000 Main Street

Address 2

City Rockville

State MD

Zip 20852

Country Montgomery

Corporate Number

Disabled ←

Location Sample Location 

Domain* NIH 

→ Save Cancel

IMPORTANT! You must select a Location at which this Facility resides in order for the facility to become available for administrators to assign it to an offering.

11. Click the **Save** button.

NOTE: From this screen, you may also check the Disabled checkbox to disable the facility. You can enable the facility again at a later date by un-checking the Disabled checkbox.

ADDING AN OWNER TO YOUR FACILITY

1. After saving your facility, click the **Add Owner link** to add the person responsible for managing the facility.

Facility Details: Sample Facility

Main	Related Info
Facility Number	00006522
Name*	<input type="text" value="Sample Facility"/>
Administrator*	<input type="text" value="Facility Manager"/>
Contact Phone	<input type="text" value="301-435-5000"/>
Contact Fax	<input type="text" value="301-435-1212"/>
Contact Email	<input type="text" value="Facility@nih.gov"/>
Address 1	<input type="text" value="1000 Main Street"/>
Address 2	<input type="text"/>
City	<input type="text" value="Rockville"/>
State	<input type="text" value="MD"/>
Zip	<input type="text" value="20852"/>
Country	<input type="text" value="Montgomery"/>
Corporate Number	<input type="text"/>
Disabled	<input type="checkbox"/>
Location	<input type="text" value="Sample Location"/> 
Domain*	<input type="text" value="NIH"/> 
Owner	→ Add Owner
No items found	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

4. Enter the search criteria for the owner and click **Search**.
5. Click the **Checkbox** next to the name of the owner.
6. Click the **Select button**.

Search Person, Internal

Supervisors: you can easily display all of **your staff** by entering your **login ID** into the "**Manager**" field, clicking the **Magnifying Glass** graphic, and then clicking the "**Search**" button.

Population* First Name
 Last Name Person ID
 Username Manager
 Organization Location
 Domain Person Type
 Security Roles Include All Suborganizations

Select Print | Export

People

Showing 1 out of 1 results

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	NIH	Manager	NIHMANAGER	Other	00165949	HNAM6		00037384

7. The owner will now appear at the bottom of the Facility Details screen.

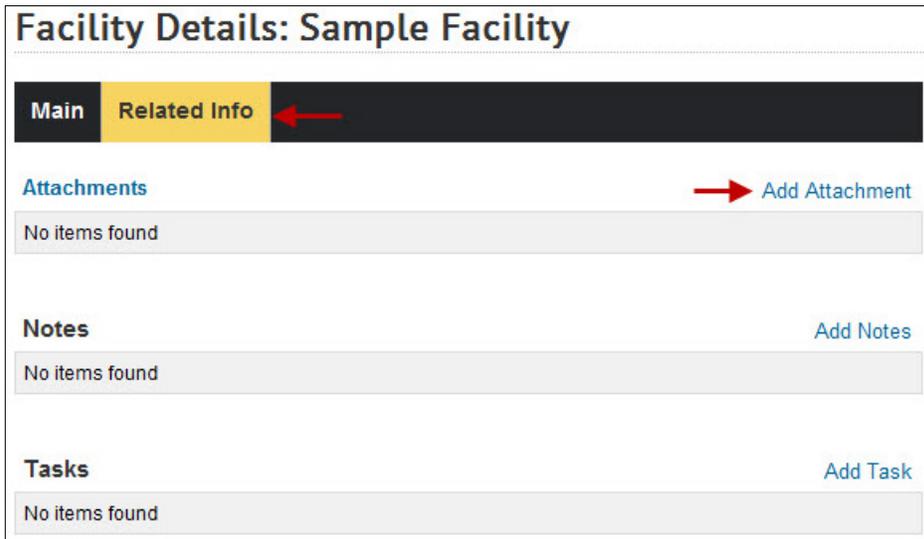
Owner Add Owner

Name	Actions
NIH Manager	Delete

NOTE: You may add multiple owners by repeating these steps and may delete an owner at any time by clicking the **Delete link** in the Actions column for the appropriate owner.

ADDING ATTACHMENTS TO FACILITIES

1. Click the Related Info tab.
2. Click the Add Attachment link.



Facility Details: Sample Facility

Main Related Info ←

Attachments [Add Attachment](#) →

No items found

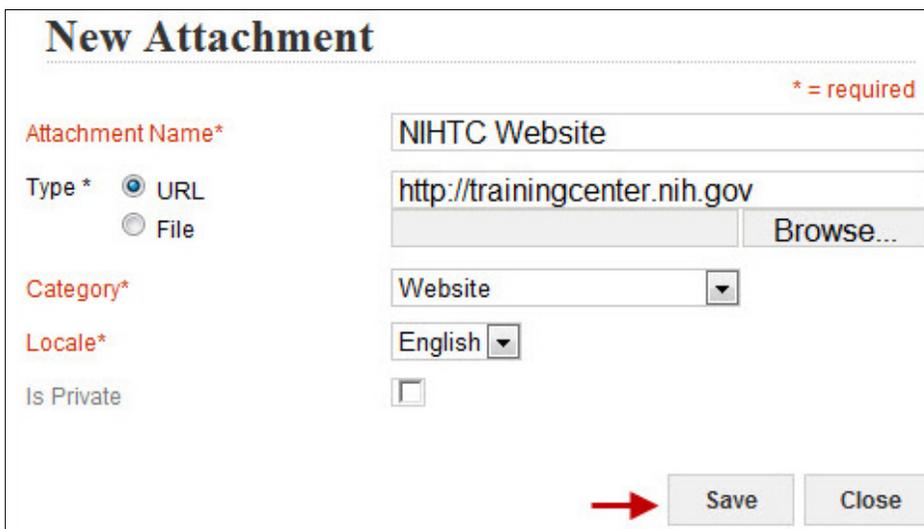
Notes [Add Notes](#)

No items found

Tasks [Add Task](#)

No items found

3. Enter a name for the attachment in the **Attachment Name** field.
4. Select the **Type** of attachment.
 - URL – enter a valid URL for the website.
 - File – Click **Browse** to search your computer for the file to be attached.
5. Select a **Category** for the attachment.
6. **Locale** should be set to English which is the default setting.
7. **Is Private** – Check this checkbox if you would like to restrict visibility of the attachment to users registered for an offering at the facility.
8. Click the **Save** button.



New Attachment

* = required

Attachment Name*

Type * URL File

Category*

Locale*

Is Private

[Save](#) [Close](#)

9. Your attachment will now appear on the Facility Details screen.
 - a. Click **Attachment Name** to open it and verify that the file/URL works properly.
 - b. Click **Edit Attachment** in the Actions column to return to the attachment details and make changes.
 - c. Click **Delete Attachment** in the Actions column to remove the attachment from the Facility.

Facility Details: Sample Facility

Main
Related Info

Attachments [Add Attachment](#) | [Print](#) | [Export](#)

Attachment Name	Type	Category	Locale	Private	Actions
NIHTC Website ←	URL	Website	English	No →	Edit Attachment Delete Attachment ←

Notes [Add Notes](#)

No items found

Tasks [Add Task](#)

No items found

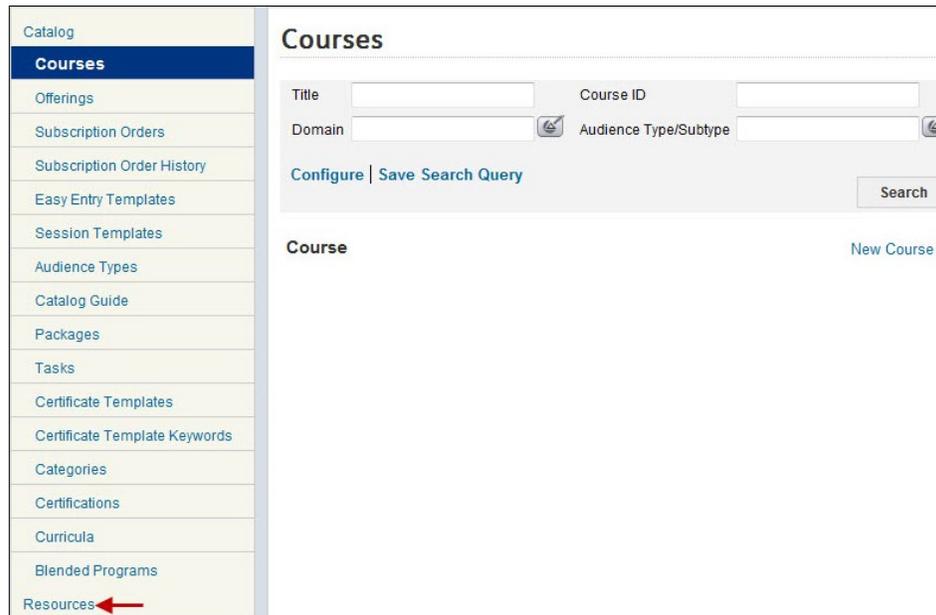
NOTE: You may add as many attachments as needed.

MODIFYING FACILITIES

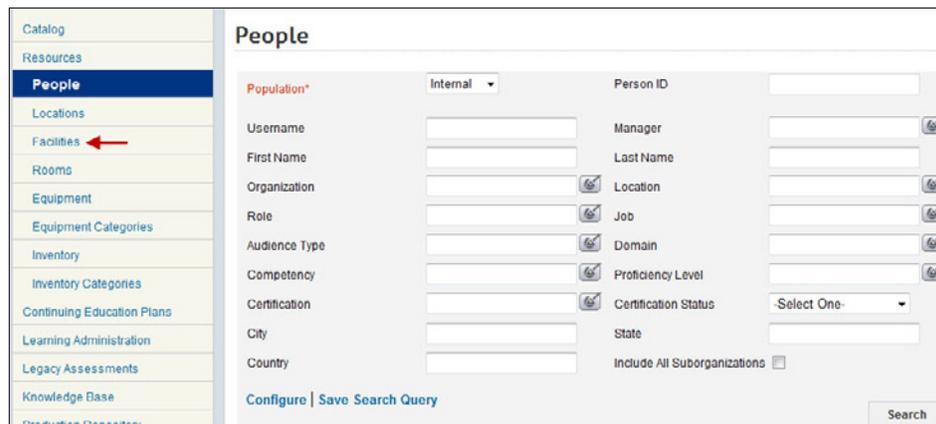
1. Select the **Admin Icon**.



2. Click the **Resources** in the left menu.

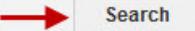


3. Select **Facilities** in the left navigation menu.



4. Enter search criteria for the facility then click **Search**.
5. Click the **name link** of the facility you want to edit.

Facilities

Facility Number Name
Administrator Location 
[Configure](#) | [Save Search Query](#) 

Facilities [New Facility](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

Name	Facility Number	Location	Administrator	Actions
Sample Facility	00006522	Sample Location	Facility Manager	Delete

6. Modify the facility details as needed.

7. Click **Save**.

Facility Details: Sample Facility

Main | **Related Info**

Facility Number: 00006522

Name*:

Administrator*:

Contact Phone:

Contact Fax:

Contact Email:

Address 1:

Address 2:

City:

State:

Zip:

Country:

Corporate Number:

Disabled:

Location: 

Domain*: 

Owner [Add Owner](#)

Name	Actions
NIH Manager	Delete



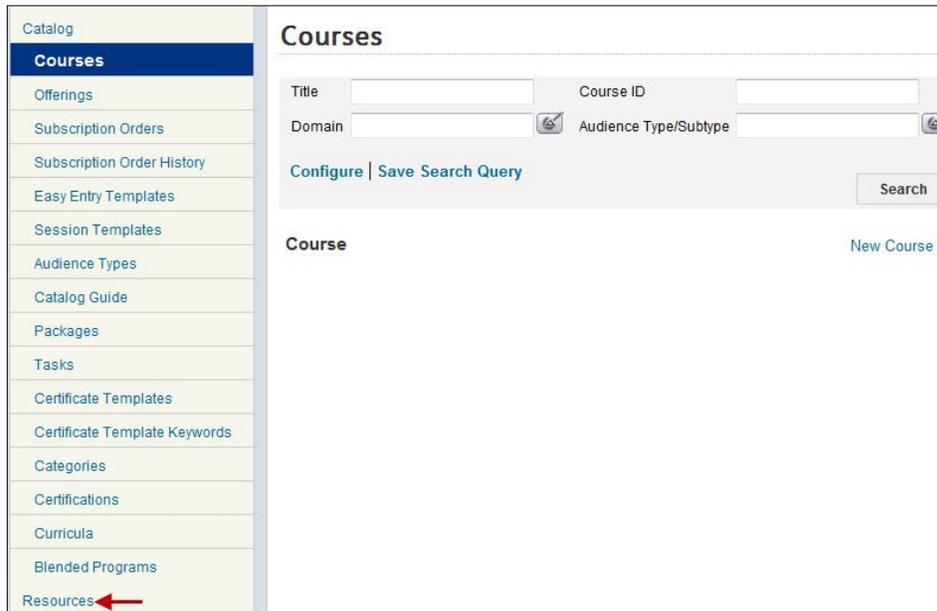
DELETING FACILITIES

IMPORTANT! You should only delete Locations that you created. Once a location is associated with an offering or delivery type, the location cannot be deleted until that relationship is discontinued.

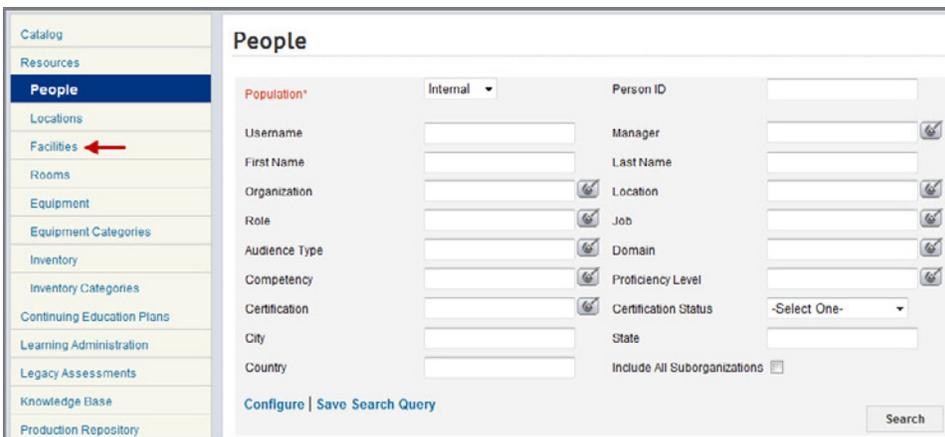
1. Select the **Admin Icon**.



2. Click the **Resources** in the left menu.



3. Select **Facilities** in the left navigation menu.



4. Enter search criteria for the facility then click **Search**.
5. Click the **Delete** link of the facility you want to remove.

Facilities

Facility Number Name

Administrator Location

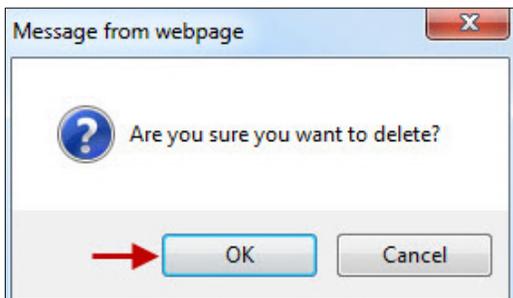
[Configure](#) | [Save Search Query](#)

Facilities [New Facility](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

Name	Facility Number	Location	Administrator	Actions
Sample Facility	00006522	Sample Location	Facility Manager	Delete

6. Click **OK** in the confirmation dialog box.



7. The facility is now deleted from the LMS if it is not associated with an offering.

ROOMS

Rooms are one of the learning resources used to deliver learning in your education services operation. Rooms are always associated with a facility. You assign rooms as resources to instructor-led offerings.

Eligible rooms for an offering are determined by the location of the offering. When you assign a room to an offering you can specify additional reservation information for the room. Rooms must be set up prior to assigning them to scheduled offerings.

IMPORTANT! Please search for and modify existing rooms before creating new ones.

Some examples of rooms are:

Conference room

Classroom 1

Classroom 2

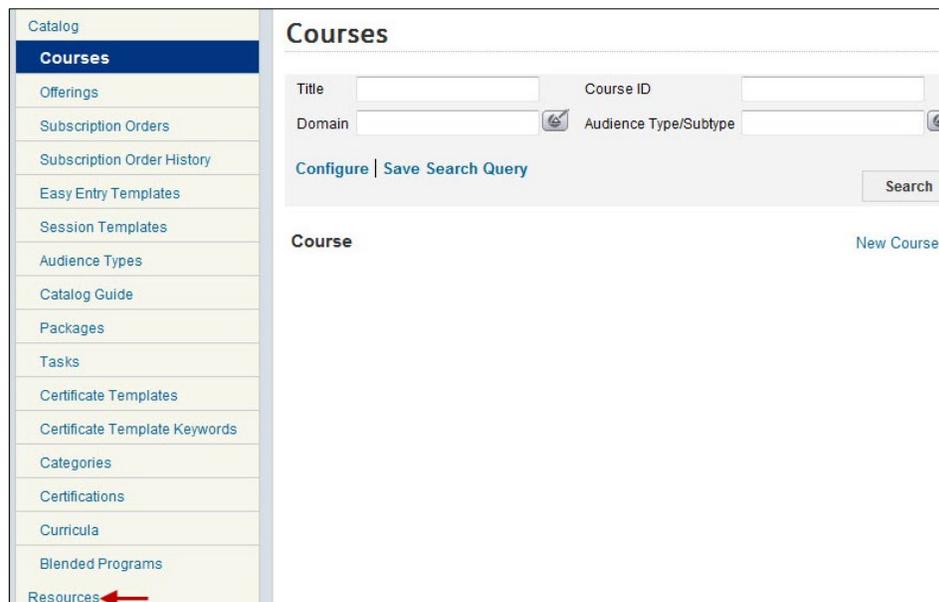
Document the names of the locations, facilities, and rooms that you are using so you can find them later.

CREATING ROOMS

1. Select the **Admin Icon**.



2. Click the **Resources** in the left menu.



3. Select **Rooms** in the left navigation menu.

Catalog

Resources

People

Locations

Facilities

Rooms

Equipment

Equipment Categories

Inventory

Inventory Categories

Continuing Education Plans

Learning Administration

Legacy Assessments

Knowledge Base

Production Repository

People

Population* Internal

Person ID

Username

Manager

First Name

Last Name

Organization

Location

Role

Job

Audience Type

Domain

Competency

Proficiency Level

Certification

Certification Status -Select One-

City

State

Country

Include All Suborganizations

Configure | Save Search Query

Search

4. Click the **New Classroom** link.

Catalog

Resources

People

Locations

Facilities

Rooms

Equipment

Rooms

Name

Location

Facility

Configure | Save Search Query

Search

Rooms [New Classroom](#)

5. Enter all available information for the new room.

6. The **Domain** field should be set to **NIH**.

7. Click the **Save** button at the bottom of the screen.

NOTE: All fields in **RED** are required to save.

New Room

Name*

Room ID

Max. Capacity*

Location* 

Disable 

Administrator 

Room Type*

Facility 

Technical Support Contact 

Domain* 

Other Information

Description

Amenities



NOTE: From this screen, you may also check the **Disable** checkbox to disable the room. You can enable the room again at a later date by un-checking the **Disable** check box.

ADDING AN OWNER TO YOUR ROOM

1. Click the **Add Owner** link to add the person responsible for managing the room.

Room Details: Sample Classroom

Default rate 0.00 USD has been added for this resource. Please update if required.

- Main** | Related Info | Schedule

Name*

Room ID

Max. Capacity*

Location*

Disable

Administrator

Room Type*

Facility

Technical Support Contact

Domain*

Owner [Add Owner](#)

No items found

Other Information

Description

Amenities

Rates [Add Rates](#) | [Print](#) | [Export](#)

Rate	Actions
0.00 US Dollars	

2. Enter the search criteria for the owner the click the **Search** button.
3. Click the **Checkbox** next to the name of the owner.
4. Click the **Select** button.

Search Person, Internal

Supervisors: you can easily display all of **your staff** by entering your **login ID** into the **"Manager"** field, clicking the **Magnifying Glass** graphic, and then clicking the **"Search"** button.

Population* First Name
 Last Name Person ID
 Username Manager
 Organization Location
 Domain Person Type
 Security Roles Include All Suborganizations

Select Print | Export

People

Showing 1 out of 1 results

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	NIH	Manager	NIHMANAGER	Other	00165949	HNAM6		00037384

5. The owner will now appear near the bottom of the Room Details screen.

Room Details: Sample Classroom

Main | Related Info | Schedule

Name*
 Room ID 00007540
 Max. Capacity*
 Location*
 Disable
 Administrator
 Room Type*
 Facility
 Technical Support Contact
 Domain*

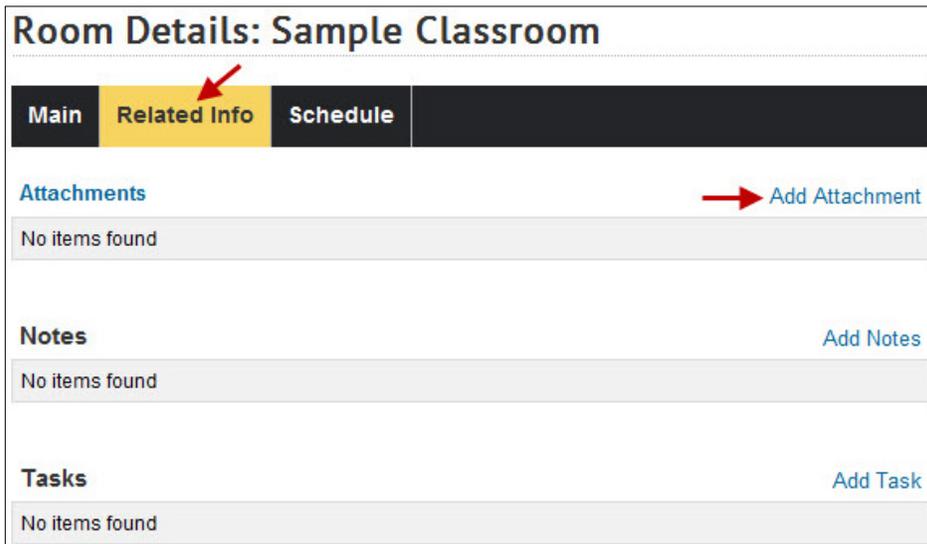
Owner Add Owner

Name	Actions
NIH Manager	<input type="button" value="Delete"/>

NOTE: You may add multiple owners by repeating these steps and may delete an owner at any time by clicking the **Delete link** in the Actions column for the appropriate owner.

ADDING ATTACHMENTS TO ROOMS

1. Click the Related Info tab.
2. Click the Add Attachment link.



Room Details: Sample Classroom

Main Related Info Schedule

Attachments [Add Attachment](#)

No items found

Notes [Add Notes](#)

No items found

Tasks [Add Task](#)

No items found

3. Enter a name for the attachment in the **Attachment Name field**.
4. Select the **Type** of attachment.
 - URL – enter a valid URL for the website.
 - File – Click **Browse** to search your computer for the file to be attached.
5. Select a **Category** for the attachment.
6. **Locale** should be set to English which is the default setting.
7. **Is Private** – Check this checkbox if you would like to restrict visibility of the attachment to users registered for an offering in the room.
8. Click the **Save button**.

New Attachment

* = required

Attachment Name*

Type * URL
 File

Category*

Locale*

Is Private

9. Your attachment will now appear on the Room Details screen.

- Click **Attachment Name** to open it and verify that the file/URL works properly.
- Click **Edit Attachment** in the Actions column to return to the attachment details and make changes.
- Click **Delete Attachment** in the Actions column to remove the attachment from the room.

Room Details: Sample Classroom

Main
Related Info
Schedule

Add Attachment | Print | Export

Attachment Name	Type	Category	Locale	Private	Actions
NIHTC Website	URL	Website	English	No	Edit Attachment Delete Attachment

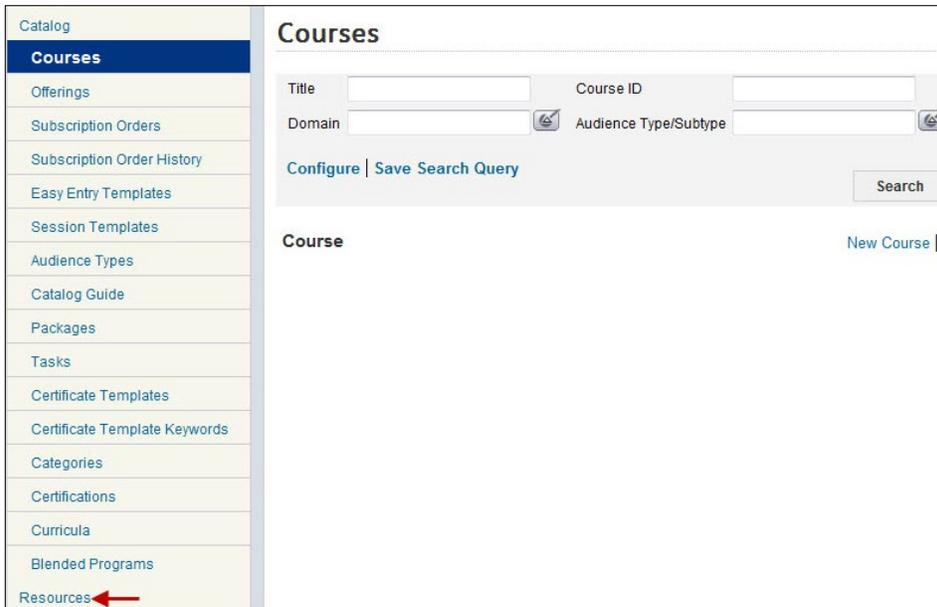
NOTE: You may add as many attachments as needed.

MODIFYING ROOMS

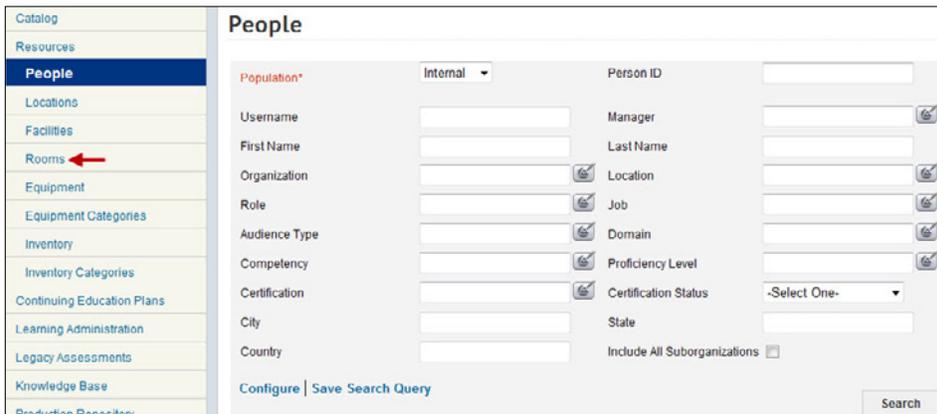
1. Select the **Admin Icon**.



2. Click the **Resources** in the left menu.

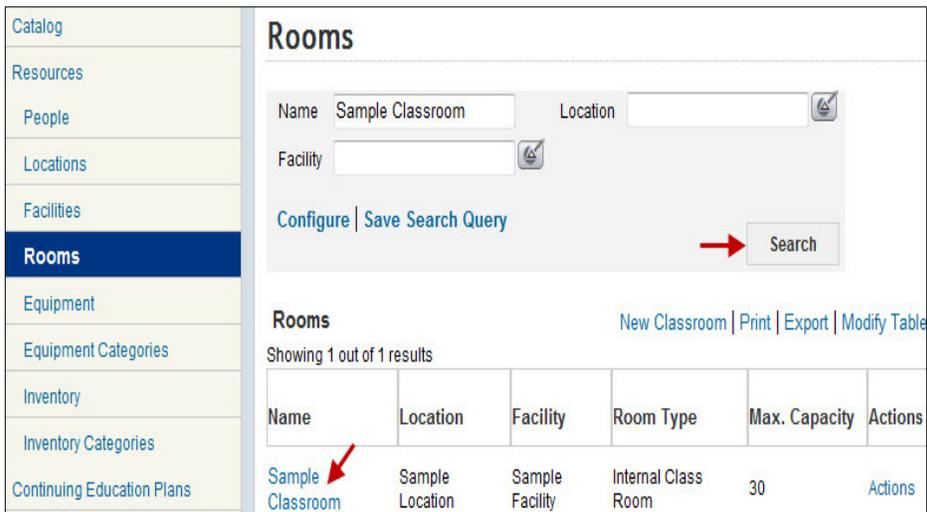


3. Select **Rooms** in the left navigation menu.



4. Enter search criteria for the room then click **Search**.

5. Click the **name link** of the room you want to edit.



6. Modify the room details as needed.

7. Click the **Save** button.

Room Details: Sample Classroom

Main	Related Info	Schedule				
Name*	Sample Classroom					
Room ID	00007540					
Max. Capacity*	30					
Location*	Sample Location 					
Disable	<input type="checkbox"/>					
Administrator	NIHLEARNINGADMIN 					
Room Type*	Internal Class Room					
Facility	Sample Facility 					
Technical Support Contact	<input type="text"/> 					
Domain*	NIH 					
Owner Add Owner						
<table border="1"> <thead> <tr> <th>Name</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>NIH Manager</td> <td>Delete</td> </tr> </tbody> </table>			Name	Actions	NIH Manager	Delete
Name	Actions					
NIH Manager	Delete					
Other Information						
Description	<input type="text"/>					
Amenities	<input type="text"/>					
Rates Add Rates Print Export						
<table border="1"> <thead> <tr> <th>Rate</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>0.00 US Dollars</td> <td></td> </tr> </tbody> </table>			Rate	Actions	0.00 US Dollars	
Rate	Actions					
0.00 US Dollars						
 <input type="button" value="Save"/> <input type="button" value="Cancel"/>						

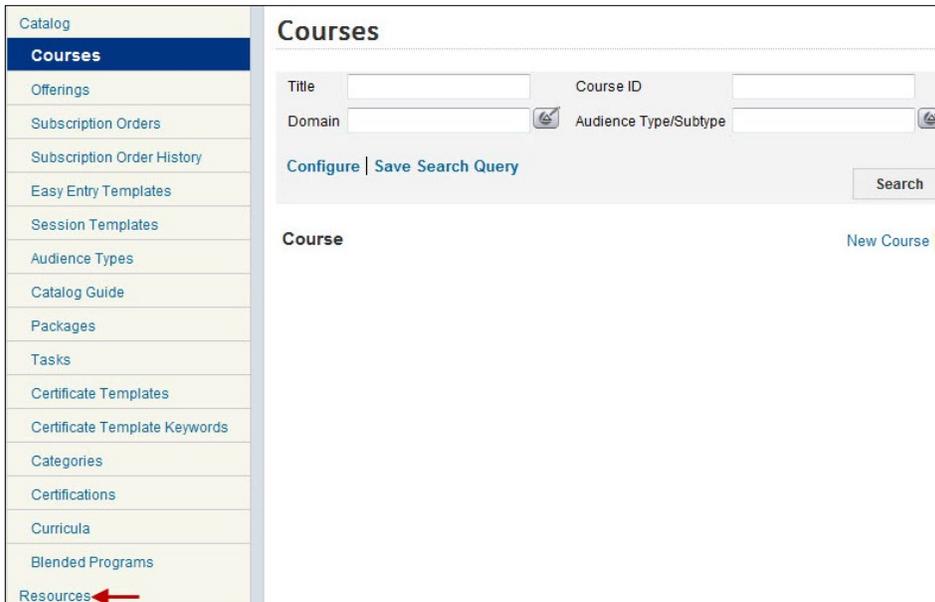
DELETING ROOMS

IMPORTANT! You should only delete Rooms that you manage.

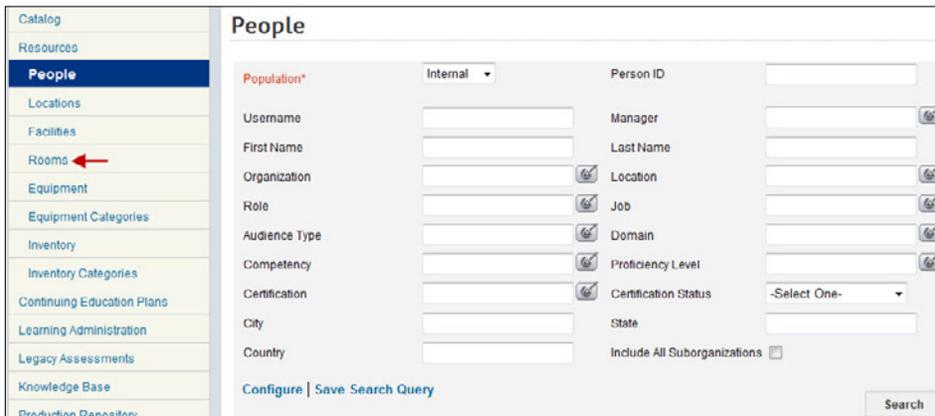
1. Select the **Admin Icon**.



2. Click the **Resources** in the left menu.



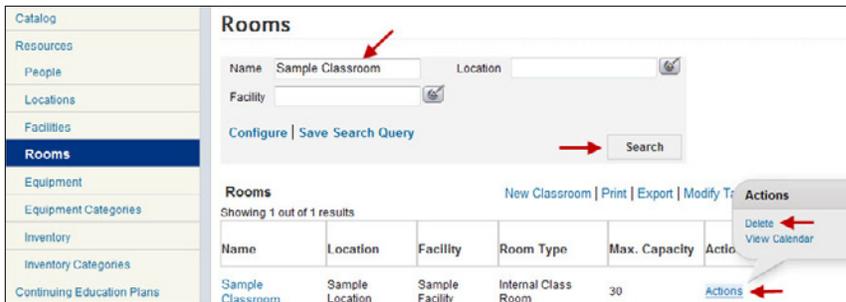
3. Select **Rooms** in the left navigation menu.



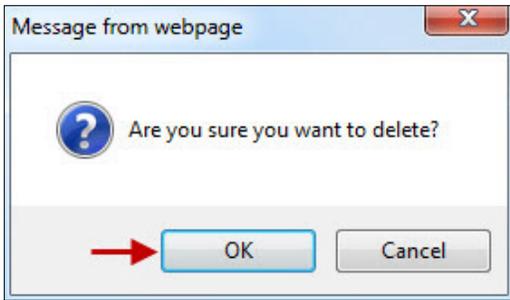
4. Enter search criteria for the room then click **Search**.

5. Click the **Actions** link in the Actions column for the room you want to permanently remove from the system.

6. Click the **Delete** link.



7. Click **OK** in the confirmation dialog box.



8. The room is now deleted from the LMS.

VIEWING ROOM AVAILABILITY

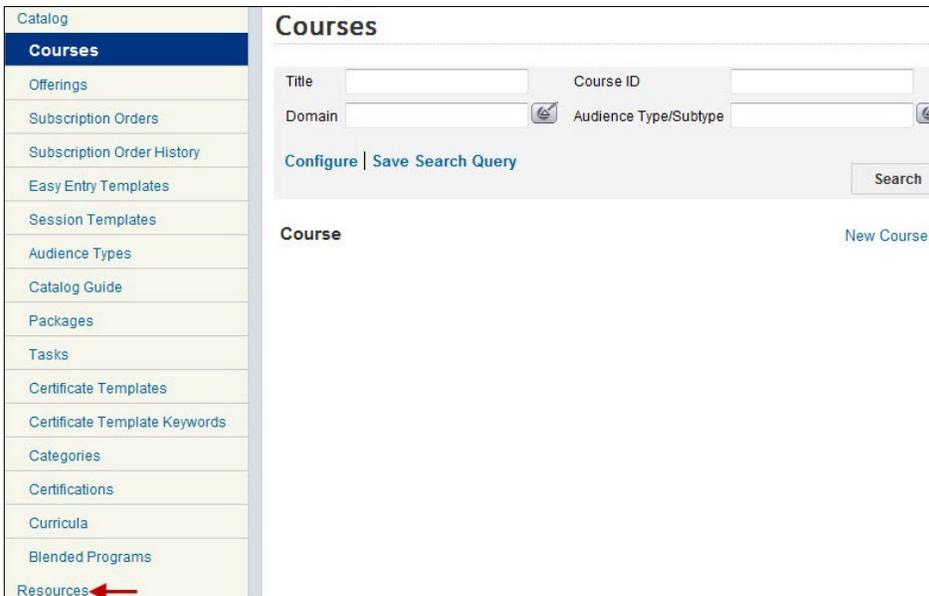
NOTE: The inclusion of location, facility, and room information in the LMS is for the purpose of communicating class location to Learners.

IMPORTANT! Designating a Room in the LMS does NOT reserve your room through NIH Events Management or the room owner. You will still need to reserve your resource as required outside of the LMS.

1. Select the **Admin Icon**.



2. Click the **Resources** link in the left menu.



3. Select **Rooms** in the left navigation menu.

4. Enter search criteria for the room then click the **Search** button.
5. Click the **View Calendar** link in the Actions column.

6. You may toggle views by clicking the Month, Week, and Day tabs at the top of the screen.

CREATING A CALENDAR APPOINTMENT

7. Click the Create Appointment link.

Resource Schedule: 00007540:Sample Classroom

Month
Week
Day

[Create Appointment](#)

February 23, 2015
Go to Date

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14

8. Enter data in all required fields then click the **Save button**.

Create Appointment

Subject*

Start Date*

End Date*

Start Time (format must be HH:MI)* : a.m. p.m.

End Time (format must be HH:MI)* : a.m. p.m.

TimeZone*

Notes

On Conflict* Ignore Fail

NOTE: It is advised to leave the On Conflict setting to “Fail”. This will help to ensure that meetings are not double-booked with previously scheduled meetings.

9. The meeting will now appear on the calendar schedule.

10. Click the **meeting link** to edit the details of the meeting if needed.

Resource Schedule: 00007540:Sample Classroom

Month	Week	Day				
			Create Appointment			
February 23, 2015			Go to Date	<input type="text"/>		Go
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3 Staff Me.. 	4	5	6	7

AUDIENCE TYPES

Audience Types are used in the LMS to group learners in the system. Similarly, Audience Sub Types allow for the further grouping of learners within an Audience Type.

These groups can then be used to control access to learning offerings in the LMS: by associating audience types and subtypes at the course level by attaching audience types with seat percentages at the delivery type level by specifying seat numbers for audience subtypes at the offering level.

The Audience Type **NIH-all** has already been created and all LMS accounts are automatically added to it. Many IC-specific Audience Sub Types already exists in the LMS as well. You may, however, wish to create an Audience Sub Type of a different grouping that will be used to aid with the registration of Learners.

IMPORTANT!

- New audience types should **not** be created.
- New groups should be created as audience sub-types and they should appear under NIH-all or one of its sub-types.
- Audience Types and sub-types can only be deleted if they are unpopulated and not referenced by a course or offering.

CREATE AN AUDIENCE SUB-TYPE

1. Click the **Admin Icon**.



2. Select **Audience Types** in the left navigation menu.
3. Click the **New Audience Sub Type** link.

4. In the **Name field**, Type "NIH" + a concise, descriptive name for the new Audience Sub Type.
5. In the **Description field**, enter a description of what this Audience Sub Type is being used for.
6. In the **Parent field**, enter the name of the Audience (or Sub) Type under which the new Audience Sub Type should fall such as NIH - all.
7. Click the **Save button**.

New Audience Sub Type

Name*

Description

Character Limit: 255
Remaining character count: 208

Parent*



IMPORTANT! Any newly created NIH Audience Types should be Sub Types of at least the NIH-all Audience Type.

ADD ALL USERS IN A SPECIFIC ORGANIZATION/SAC CODE

1. Click the expansion arrow for Organization.

Audience Sub Type Details: NIH Sample Audience Sub Type

Name*

Description

Character Limit: 255

Parent

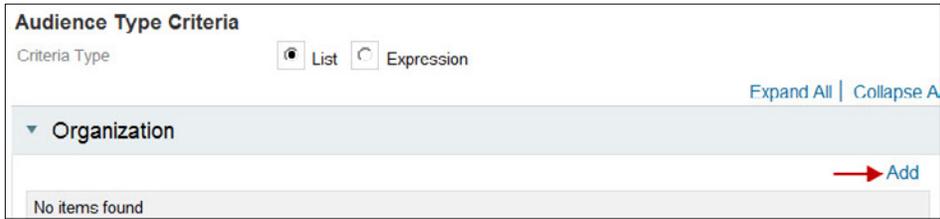
Audience Type Criteria

Criteria Type List Expression

[Expand All](#) | [Collapse All](#)

-  Organization
- Person
- Home Domain
- Job
- Role
- Person Status
- Person Type
- Manager

2. Click the **Add link** in the Audience Type Criteria section.



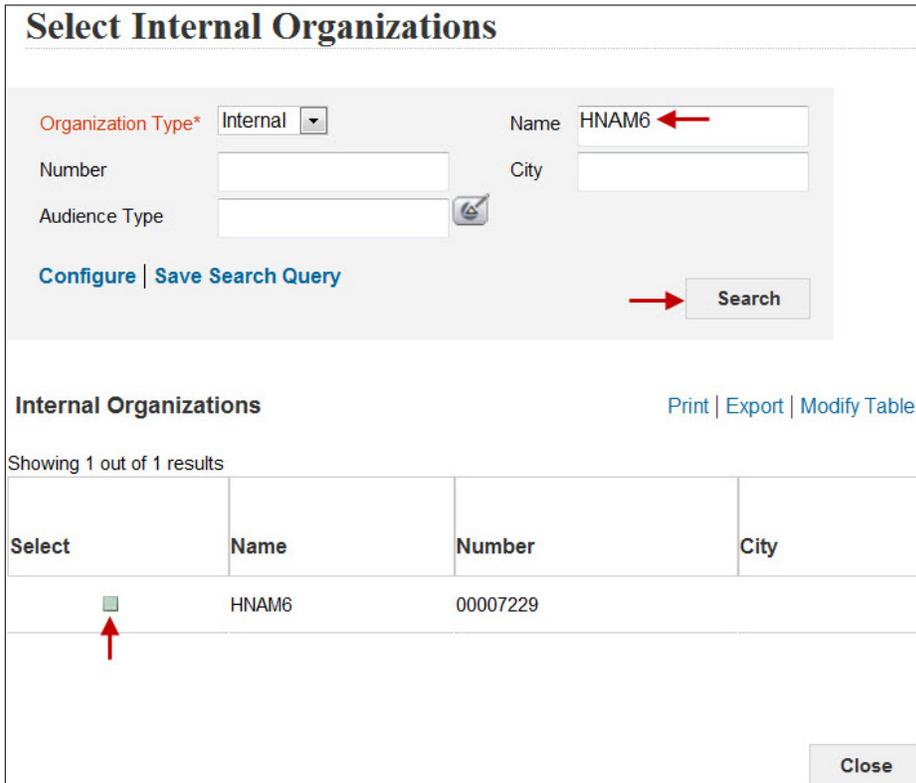
Audience Type Criteria
Criteria Type List Expression [Expand All](#) | [Collapse A](#)

Organization

[Add](#)

No items found

3. Enter search criteria for the organization then click the **Search button**.



Select Internal Organizations

Organization Type* Name [←](#)

Number City

Audience Type 

[Configure](#) | [Save Search Query](#) [Search](#)

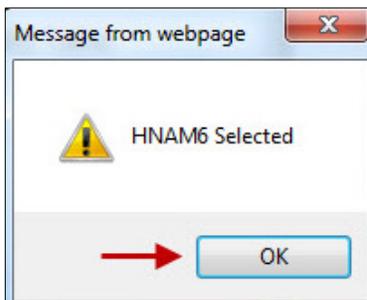
Internal Organizations [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

Select	Name	Number	City
<input type="checkbox"/>	HNAM6	00007229	

[Close](#)

4. Click the OK button in the confirmation window.



Message from webpage

 HNAM6 Selected

[OK](#)

5. The organization will now be a part of the audience sub type.

The screenshot shows the 'Audience Type Criteria' interface. At the top, there are radio buttons for 'List' (selected) and 'Expression'. To the right are links for 'Expand All' and 'Collapse All'. Below this is a section for 'Organization' with a dropdown arrow and an 'Add' link. Underneath, it says 'Showing 1 out of 1 results'. A table displays the following data:

Organization	Number	City	Actions
HNAM6	00007229		Delete

6. Clicking the Delete link in the Actions column will remove the organization from the audience sub type.

7. Follow the above steps to add additional organizations or other criteria.

NOTE: Deleting organizations from the audience sub type does not remove the organization or any of its members from the LMS. It does remove all people with that organization code in their LMS profile from the audience sub type.

VIEW ALL MEMBERS OF AN AUDIENCE SUB TYPE

1. While viewing the Audience Sub Type Details screen, click the **View Members button**.

This screenshot is similar to the previous one but includes a list of other criteria below the Organization section: Person, Home Domain, Job, Role, Person Status, Person Type, and Manager. At the bottom of the interface, there are three buttons: 'Save', 'Close', and 'View Members'. A red arrow points to the 'View Members' button.

2. All of the members of the audience sub type will be displayed.

View Members

First Name Status

Last Name User Name

Person Type Domain 

Organization 

[Configure](#) | [Save Search Query](#)

1 2 3 4 5 Next 

[Print](#) | [Export](#) | [Modify Table](#)

First Name	Last Name	Manager	Organization	Status	Person Type	Home Domain
ALISA	GREEN	Alfred	HNAM6	Terminated	Federal	NIH
Alpha	Diallo		HNAM6	Terminated	Contractor	NIH
Antoinese	CIURVAN		HNAM6	Terminated	Contractor	NIH

SESSION TEMPLATES

A Session Template defines a period of time that can be used to schedule learning offerings. It defines the number of sessions, the length of each session, and the days of the week and times when each session of the offering will be held.

An example of a session might be:

- Monday and Tuesday from 8:30AM to 4:30PM
- Wednesday 9AM to 12PM then 1PM to 4PM
- The next four Mondays from 9AM to 5PM

Each Session Template consists of one or more sessions, grouped by weeks. Each session consists of a day of the week, and a start and end time. To accommodate breaks and meal times, a day can be divided into multiple sessions. The total hours for a Session Template are calculated automatically, based on the number of sessions in the template and the length of each session.

Weekly Session Templates are for use with scheduled offerings that are held on the same days of the week over multiple weeks. For weekly Session Templates, you specify the duration of the Session Templates in number of weeks. You then add sessions by specifying start date, start time, and end time for each session. Each session you add is replicated in the template over the specified duration of the template.

All Session Templates are NIH-specific and their names are prefaced with “NIH”.

IMPORTANT! Please modify existing Session Templates before creating new ones.

Name requirements:

Begins with “NIH”

3-letter day codes (Mon, Tue, Wed, Thu, ...)

Hyphenated time (8:30-3, 9-12, 10-11:30, ...)

Session Template examples:

NIH Mon 9 – 11

NIH Mon - Wed 9 – 5

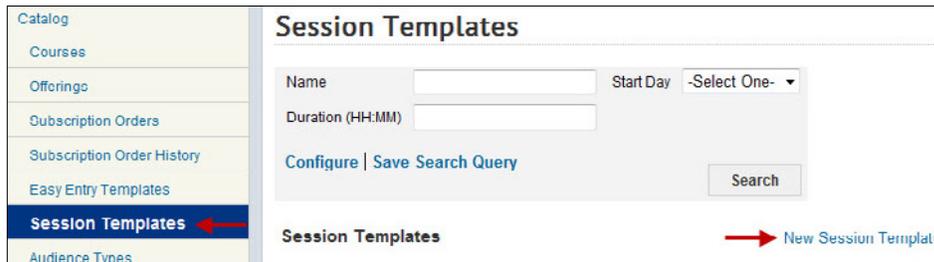
NIH Mon, Wed, Fri 1 – 4:30

CREATING A SESSION TEMPLATE

1. Select the **Admin Icon**.



2. Select **Session Templates** in the left menu.



3. In the **Name field**, enter a name for the session template according to the Name Requirements listed on the previous page.
4. Select the **Weekly Session Type** radio button to define the type of template you want to create. (Default)

NOTE: If you want to create a new session template that will only be used once, then select the **Ad Hoc** radio button instead.

5. In the **No. Of Weeks** field, enter the number of weeks for which sessions associated with this template will be held.

NOTE: The **No. Of Weeks** field does not apply when the **Ad hoc** session type is selected.

6. Click the **Next button**.

7. Click the **Add Session** link.

New Session Template

Name* NIH Wed 9am - 5pm

Domain* NIH

Session Type Weekly

Sessions

Number of Sessions 0

Total Duration 0 Hours 0 Mins

Session  [Add Session](#)

No items found

Save Cancel

8. From the **Session Day** drop-down menu, select the day of the week on which the session will be held.

9. In the **Start Time (HH:MM)** and **End Time (HH:MM)** fields, enter the start and end times for the session.

10. Click the **Save button** to add the session then click the **Close button**.

Add Session

Session Day* Wednesday

Start Time (HH:MM)* 09 : 00 a.m. p.m.

End Time (HH:MM)* 05 : 00 a.m. p.m.

 Save  Close

NOTE: The session is listed at the bottom of the New Session Template screen and will be replicated for each week specified in the No. Of Weeks field.

11. To add more sessions to the template, repeat Steps 9 – 13.

EDIT AND DELETE A SESSION IN A SESSION TEMPLATE

1. To edit a session's details, click the Session link.

Session Template Details: NIIH Wed 9am - 5pm

Name*

Domain

Sessions

Number of Sessions

Total Duration

Session [Add Session](#) | [Print](#) | [Export](#) | [Modify Table](#)

Week	Session	Day	Start Time	End Time	Actions
1	1	Wednesday	09:00 a.m.	05:00 p.m.	Delete

2. Edit the information on the Session Details page then click the Save button.

Session Details

Session Week*

Session Day*

Start Time (HH:MM)* : a.m. p.m.

End Time (HH:MM)* : a.m. p.m.

NOTE: Make sure that the Name is reflective of the session day and times that are selected.

3. Click the **Delete** link in the Actions column to delete any session.

Session Template Details: NIIH Wed 9am - 5pm

Name*

Domain NIH

Sessions

Number of Sessions 1

Total Duration 8 Hours 0 Mins

Session [Add Session](#) | [Print](#) | [Export](#) | [Modify Table](#)

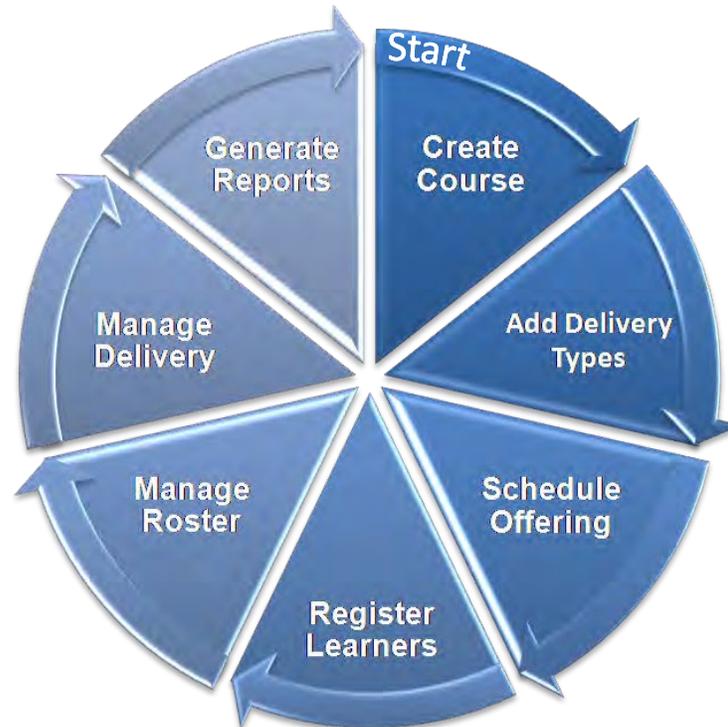
Week	Session	Day	Start Time	End Time	Actions
1	1	Wednesday	08:00 a.m.	04:00 p.m.	 Delete

MANAGING COURSES

COURSE MANAGEMENT LIFECYCLE

Course management in the LMS (whether it's a course that will be delivered as an instructor-led, web-based, seminar, or any other type of offering), requires that a Learning Administrator perform a standard series of tasks during the course's lifecycle. Each of these steps is essential to properly creating and managing learning events (also known as classes or "offerings") in the system.

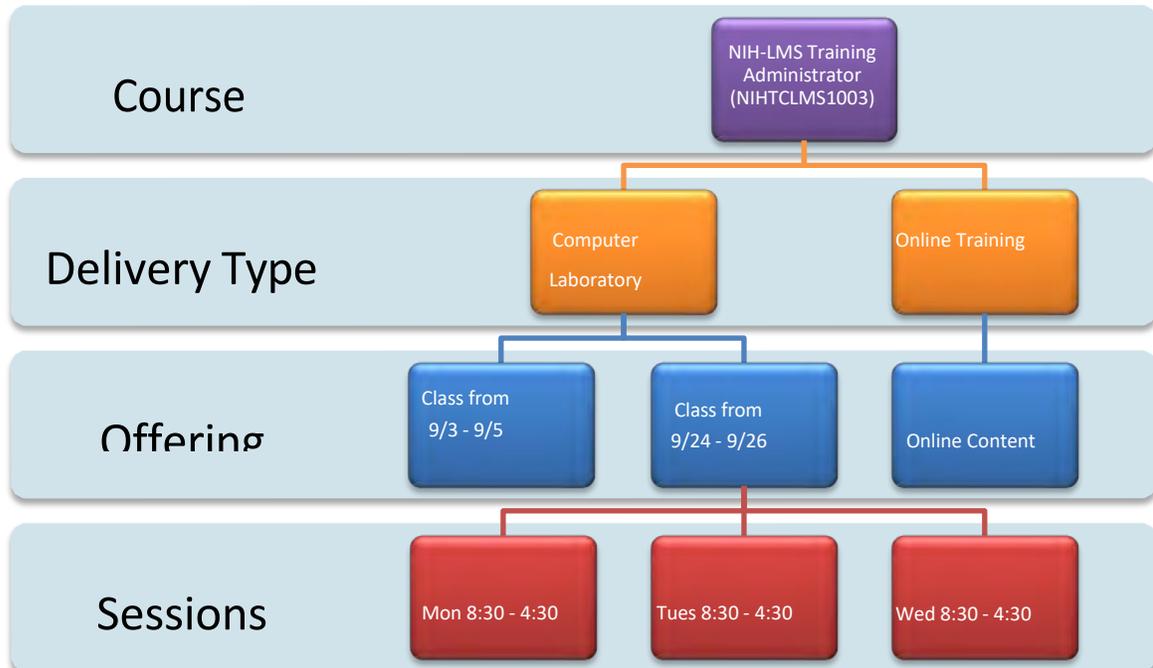
The following figure depicts the Course Management lifecycle at a high level:



A course is the highest level in the learning hierarchy. It represents a topic of study that can be delivered in various formats across multiple instances.

THE LEARNING HIERARCHY

Each learning event that is managed in the LMS is part of a structured series of hierarchical components. It is this hierarchy that allows us to manage aspects of how a topic of study will be delivered—or communicated—to learners, at varying levels of granularity.



The **COURSE**, as the broadest component, resides at the top of the hierarchy and is used to manage information that is common to all Delivery Types and Offerings (or learning events) associated with this topic of study.

DELIVERY TYPES are added by the Learning Administrator once a Course is created. The Delivery Type is a sub-component of the course, and is used to manage information that is common to all instances of a specific type of delivery or communication method. Instructor-Led classes, for example, may have different information associated with them than Web Casts do for the same Course (e.g., all instructor-led classes for a particular course are a total of 16 hours in duration, whereas all Web Casts associated with this Course are a total of 2 hours in duration).

IMPORTANT! Each Course must have *at least* one Delivery Type in order for you to set-up a class for which students may register. Courses may have multiple unique Delivery Type assigned, however, each Delivery Type may only be assigned once (e.g., no Course may have 2 Instructor-Led Delivery Types assigned, but it may have one each of multiple Delivery Types assigned.)

OFFERINGS, or what we traditionally think of as classes, are then created in association with their respective Delivery Type(s). They are used to manage information that is specific to a particular learning event for which learners may enroll. Each Offering, for example, may have different start and end dates, or may be held in different classrooms.

SESSIONS, which are grouped together in the Session Template, are used by the LMS to define the start and end times for each day of an Offering. In some cases, an Offering may only have one Session in the Session Template because it is only a one-day class. A multi-day class, however, would have multiple Sessions included in the Session Template; one Session for each day that a Learner is expected to attend the class. A Monday, Wednesday, and Friday Offering, for example, will have a separate Session defined for Monday, Wednesday, and Friday. Those three Sessions together make up the Session Template.

ENTERPRISE HUMAN RESOURCE INFORMATION (EHRI) DATA

When creating a new course, EHRI data must be recorded in the Other Information section. Any field in this section prefaced with “EHRI:” is required information; however, because the necessary information may not be available at the moment the course is created, these fields are not marked as required in the system. Doing so would prevent you from saving your new course unless all fields are complete.

Any EHRI field not completed during course creation should be completed as soon as the information becomes available.

What is EHRI Data?

Enterprise Human Resources Integration is a President’s Management Agenda requirement that is tracked by OPM.

The LMS transmits this data to OPM on a bi-weekly basis.

Learning Administrators are responsible for making sure this requirement is met.

Empty or incorrectly completed EHRI fields will be recorded as “errors” by OPM, and may cause result in NIH being deemed non-compliant with the PMA requirement.

More information on EHRI may be found at <http://www.opm.gov/egov/e-gov/EHRI/>

TIP: Refer to Appendix B of this document for more detailed information about entering EHRI field data.

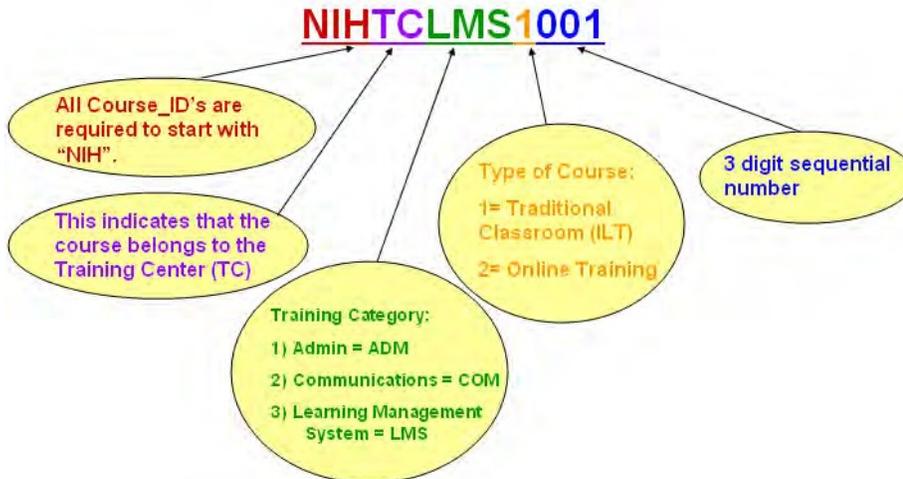
COURSE SETUP

DEFINING A COURSE ID

As part of the course creation process, you will need to generate a unique Course ID that will be entered during the course creation process.

Please take note of the following:

- All Course ID's are required to start with "NIH".
- Course ID's are entered manually by the Learning Administrator creating the course.
- They should follow a standardized, structured sequence that is defined by your organization.
- Course ID's are a valuable tool that help learners locate a particular course's offerings in the LMS.
- The following graphic depicts the standardized structure of a sample NIH Training Center Course ID:



CREATING A BASIC INSTRUCTOR-LED COURSE

1. Select the **Admin Icon**.



2. Select **Courses** in the left menu. (Default)
3. Click the **New Course** link.

4. Enter all pertinent information about the course including all required fields.
5. Enter information as available in the Other Information section of the page.

NOTE: Although the EHRI fields listed on this screen are not required by the system, it is the responsibility of the Learning Administrator to ensure that these fields contain EHRI accepted values.

IMPORTANT! Please refer to [Appendix B](#) of this document for detailed information about accepted EHRI field values.

6. Click the **Save** button.

New Course

For information on EHRI values, please refer to the [OPM Guide to Data Standards](#).

Course Details

Title* NIH LMS Training Sample

Course ID* NIHLMS00001

Version FY2015

Domain* NIH Common

Abstract
*Training examples
*IMS Course Guidance
*Learning Administrator Support
Character Limit:1000
Remaining character count: 925

Description
This course is designed to show Learning Administrators how to build and manage a catalog of courses in LMS.
Character Limit:1000
Remaining character count: 892

Course Deeplink URL

Course Deeplink URL for Private View

Recurring Course

Mark Course as Recurring Course

Availability Information

Available From* 02/01/2015

Discontinued From

Display for Call Center

Display for Learner

Allow Ratings

Pricing Information

One-click Launch Enabled

Currency* US Dollars

Price* 0.00

Multi-Currency Pricing
 This Course is available only in the currency selected above.
 This Course is available in the currency selected above and default currency, US Dollars.
 This Course is available in all the active currencies in the system. Note: Prices are only calculated for currencies that have exchange rates defined in the system.

Training Units

Registration Information

Min Count 5

Max Count 25

Waitlist Max 10

Vendor

Customer Service Representative NIHLARNINGADMIN

Target Completion Duration 0 Days

Allow Drop Before Days 0

Other Information

Training Accreditation Organization Type (1103)

Course ID From Vendor (1105) NIHLMS00001

EHRI: Training Credit (1126)

EHRI: Training Credit Designation Type Code (1127) Other

EHRI: Training Delivery Type Code (1129) Technology Based

EHRI: Training Credit Type Code (1131) NA (Not Applicable)

Instructor Competencies (1200)

Multilingual Course (1201)

Internal or External Course (1202) Internal

Training Certification Type (1211)

Course Development Cost (1220)

EHRI: Training Tuition and Fees Cost (1221)

EHRI: Training Materials Cost (1222)

EHRI: Continued Service Agreement Required Indicator (1231) NA

EHRI: Training Accreditation Indicator (1102) Non Applicable

EHRI: Training Source Type Code (1120)* Government Internal

EHRI: Training Purpose Type Code (1122) Develop Unavailable Skills

EHRI: Training Type Sub Code (1124) Information Technology

Save Cancel

NOTE: In the screenshots below you will find highlighted areas that change after clicking the **Save** button.

Course Details: NIH LMS Training Sample, #NIHLMS00001

For information on EHR values, please refer to the [OPM Guide to Data Standards](#).

- Main
- Learning Assignments
- Related Info
- Policies
- Delivery Types
- Notifications
- Ratings

Course Details

Title*

Course ID*

Version

Domain*

Abstract

Description

Course Deepink URL <https://test.learning.nhs.gov/SabaWeb/Cloud/goto/GuestCourseDetailsURL?oid=cours000000000449538&callerPage=learning/offerings/TemplateDetails.xml>

Course Deepink URL for Private View <https://test.learning.nhs.gov/SabaWeb/Cloud/goto/GuestCourseDetailsURL?oid=cours000000000449538&callerPage=learning/offerings/TemplateDetails.xml&privateView=true>

Owner [Add Owner](#)

No items found

Recurring Course

Mark Course as Recurring Course

Availability Information

Available From*

Discontinued From

Display for Call Center

Display for Learner

Allow Ratings

Audience Type / Audience Sub Type [Add Audience Type](#)

No items found

Pricing Information

One-click Launch Enabled

Price* [Add Price](#) | [Print](#) | [Export](#)

Currency	Price*	Actions
US Dollars	0.00	Edit Delete

Training Units

Registration Information

Min Count

Max Count

Waitlist Max

Vendor

Customer Service Representative

Target Completion Duration Days

Allow Drop Before Days

Other Information

EHR: Training Accreditation Indicator (1102)

Training Accreditation Organization Type (1103)

Course ID From Vendor (1105)

EHR: Training Source Type Code (1120)*

EHR: Training Purpose Type Code (1122)

EHR: Training Type Sub Code (1124)

EHR: Training Credit (1126)

EHR: Training Credit Designation Type Code (1127)

EHR: Training Delivery Type Code (1129)

EHR: Training Credit Type Code (1131)

Instructor Competencies (1200)

Multilingual Course (1201)

Internal or External Course (1202)

Training Certification Type (1211)

Course Development Cost (1220)

EHR: Training Tuition and Fees Cost (1221)

EHR: Training Materials Cost (1222)

EHR: Continued Service Agreement Required Indicator (1231)

- [View All Offerings](#)
- [Create New Version](#)
- [Save](#)
- [Cancel](#)

ADDING AN OWNER TO A COURSE

Once a course is created and saved, an owner should be designated at the course level. This helps other administrators identify a point of contact that is responsible for the course.

1. Click the **Add Owner** link in the Course Details section of the **Main** tab.

Course Details: NIH LMS Training Sample, #NIHLMS00001

For information on EHRI values, please refer to the [OPM Guide to Data Standards](#).

Main Learning Assignments Related Info Policies Delivery Types Notifications Ratings

Course Details

Title* NIH LMS Training Sample

Course ID* NIHLMS00001

Version FY2015

Domain* NIH Common

Abstract
*Training Examples
*LMS Course Guidance
*Learning Administrator Support
Character Limit:1000

Description
This course is designed to show Learning Administrators how to build and manage a catalog of courses in LMS.
Character Limit:1000

Course Deeplink URL
<https://test.learning.hhs.gov/Saba/Web/Cloud/goto/GuestCourseDetailURL?otId=cours000000000449536&callerPage=learning/offeringTemplateDetails.xml>

Course Deeplink URL for Private View
<https://test.learning.hhs.gov/Saba/Web/Cloud/goto/GuestCourseDetailURL?otId=cours000000000449536&callerPage=learning/offeringTemplateDetails.xml&privateView=true>

Owner [Add Owner](#)

No items found

2. Enter search criteria for the course owner then click the **Search** button.
3. Select the **checkbox** next to the name of the owner.
4. Click the **Select** button.

Search Person, Internal

Supervisors: you can easily display all of your staff by entering your login ID into the "Manager" field, clicking the **Magnifying Glass** graphic, and then clicking the "Search" button.

Population* Internal

Last Name Learning

Username

Organization

Domain

Security Roles -Select One-

First Name NIH

Person ID

Manager

Location

Person Type -Select One-

Include All Suborganizations

[Search](#)

Select

People [Print](#) | [Export](#)

Showing 1 out of 1 results

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	NIH	LearningAdmin	NIHLARNINGADMIN	Other	00165951	HNAM6		NIHMANAGER

[Select](#) [Close](#)

5. The owner will now appear on the course details screen.

Course Details: NIH Sample LMS Course, #NIHSAMPLE1001  

* = required

Main Learning Assignments Related Info Policies Delivery Types

Course Details

Title* NIH Sample LMS Course

Course ID* NIHSAMPLE1001

Version 2013

Domain* NIH Common 

Abstract Enter an abstract here of up to 1000 characters here.

Description Enter a description of up to 1000 characters here.

Course DeepLink URL <https://training.learning.hhs.gov/Saba/Web/Main/goto/GuestCourseDetailURL?otid=cours00000000423888&callerPage=/learning/offeringTemplateDetails.xml>

Owner [Add Owner](#)

Name	Actions
NIH Learner	Delete

NOTE: You may delete an owner by clicking the **Delete** link.

ADD AN AUDIENCE TYPE TO A COURSE - OPTIONAL

Once a course is created, Audience Sub-Types may be added at the course level. Keep in mind that the audience sub-type used at the course level will be the broadest population of people allowed to take the course.

1. From the course's Main tab, scroll down to the Audience Type/Audience Sub Type section and click the Add Audience Type link in the Availability Information section.

Availability Information

Available From* 02/26/2015

Discontinued From

Display for Call Center

Display for Learner

Allow Ratings

Audience Type / Audience Sub Type [Add Audience Type](#)

No items found

2. Select Audience Sub Type from the Audience Type/SubType pull-down menu.
3. In the **Name** field, enter the name of the Audience Sub-Type then click the **Search** button.

NOTE: All NIH Audience Types used in offerings will be sub types of the NIH – all audience type. Using your created audience subtype at this level will not allow you to open the course up to any other people outside of the audience subtype.

4. Click the **checkbox** associated with the audience sub-type.
5. Click the **Select** button.

Select Audience Type / Audience Sub Type

Name NIH Sample Audience Type/SubType Audience SubType

Show System Generated

[Search](#)

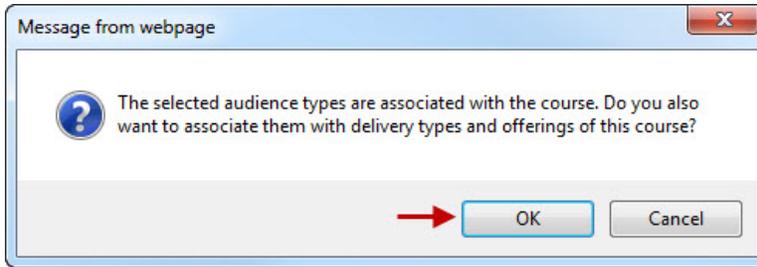
Select Audience Sub Type [New Audience Sub Type](#) | [Print](#) | [Export](#)

Showing 1 out of 1 results

<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	NIH Sample Audience Type

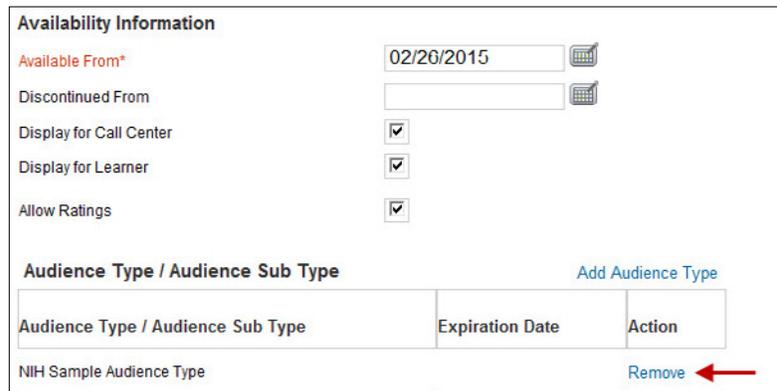
[Select](#) [Close](#)

6. Click the OK button in the confirmation popup window.



7. The course and any future offerings that are created from it will be restricted to just the members of the audience sub-type.

8. You may also delete the audience sub-type by clicking the **Remove link**.



Availability Information		
Available From*	02/26/2015	
Discontinued From		
Display for Call Center	<input checked="" type="checkbox"/>	
Display for Learner	<input checked="" type="checkbox"/>	
Allow Ratings	<input checked="" type="checkbox"/>	
Audience Type / Audience Sub Type		Add Audience Type
Audience Type / Audience Sub Type	Expiration Date	Action
NIH Sample Audience Type		Remove 

LEARNING ASSIGNMENTS TAB

ADDING ONLINE CONTENT

Courses that contain an online component or supplemental learning files need to have the content attached to it. Assigning the content to the course level will ensure that every delivery type and every offering will have the same content assigned to it by default. Content can be added or deleted at the delivery type and offering levels.

NOTE: If this course is intended to be available as instructor-led and online, it is recommended that the online content be attached at the delivery type or offering level.

Prior to attaching online content modules to the course, they must first be uploaded to the content repository by a Content Administrator. Refer to the LMS Content Administrator Guide for instructions on how to do this.

1. Click the **Learning Assignments** tab.
2. Click **Add Content** in the popup bubble.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main **Learning Assignments** Related Info Policies Delivery Types Notifications Ratings

Learning Assignments
Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content [Add Learning Assignments](#)

No items found

Evaluations
Add evaluations that the learner must complete after all learning assignments are completed.

Launch evaluation on completion

Evaluation [Add Evaluation](#)

No items found

Save

Add Learning Assignments
Add Tasks
Add Content

- 3.
4. Enter search criteria for the content being added then click the **Search** button.
5. Click the **checkbox** that appears to the left of the content name.
6. Click the **Add Assignment Details** button.

1. Select Content Modules <<<>>> 2. Add Assignment Details

Select content modules to add as learning assignments to NIH LMS Training Sample

Search Browse

Folder Type: -Select One- Name: DDM Seminar Series
 Version Number: Content Format: -Select One-
 Content Type: -Select One- Language:
 Author: Keywords:
 Folder Name: Available From >=:
 Available From <=: Last Modified On >=:
 Last Modified On <=: Competency:
 Owner: Content Provider: -Select One-
 Delivery Vendor: Select One Include non-scoring content modules:

Search

Contents
Showing 1 out of 1 results

Select	Name	Version Number	Content Format	Folder Name
<input checked="" type="checkbox"/>	DDM Seminar Series - April 2014	FY14	SCORM Package	NIHIC

[Add Assignment Details](#) [Close](#)

IMPORTANT: Any content that is not SCORM compliant will be automatically marked complete when accessed by the learner.

LEARNING ASSIGNMENT DETAILS

The following options are available for your content:

Type

- Training Content – Use for online course content.
- Pre Class Assessment – Use for tests that are taken in advance of the training.
There is also an option for a learner to test out of the class.
- Post Class Assessment – Use for tests that are taken after training has occurred.

Attempts

- Unlimited – Use to allow learners to retake the content as many times as needed to gain a successful completion.
- Limited – Use to specify the exact number of tries on the content that is allowed for a learner.

Details

- Enabled – When this box is checked, the content is able to be accessed by learners.
- Required – When this box is checked, the content is required to be passed as part of a successful completion for the course.
- Test Out – When this box is checked, successful completion of a pretest will mark this course complete.
- Sign Off – When this box is checked, learners may use the signoff function to receive a successful completion.
- Consider For Overall Score – When this box is checked, it will use the score in the content as part of the mastery score average for the course to determine a successful completion.

1. Adjust the settings for the course content then click the **Save** button.

Add Learning Assignments: Add Content

1. Select Content Modules <--> 2. Add Assignment Details

Add assignment details for the selected modules.

Name	Type	Attempts on Content	Mastery Score	Details
DDM Seminar Series - April 2014	Training Content	Unlimited		<input checked="" type="checkbox"/> Enabled <input checked="" type="checkbox"/> Required <input type="checkbox"/> Test Out <input type="checkbox"/> Sign Off <input checked="" type="checkbox"/> Consider For Overall Score

Use the pre-class assessment content as post-class assessment

Save Back Close

2. The Content Modules section will be updated.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main Learning Assignments Related Info Policies Delivery Types Notifications Ratings

Learning Assignments

Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content

Add Learning Assignments | Print | Export

Up	Down	Type	Name	Details	Requirement	Actions
		Training Content	DDM Seminar Series - April 2014	Attempts on Content Allowed: Unlimited Status: Enabled	Required	Edit Assignment Details

Actions

- [Edit Assignment Details](#)
- [Disable Content Module](#)
- [Delete Content module](#)
- [Edit Content Module Details](#)
- [Configure Attempts on Content](#)

Click the name link to view the content

Click the Edit Assignment Details link to change your settings

Evaluations

Add evaluations that the learner will see when learning assignments are completed.

Launch evaluation on completion

Evaluation

Add Evaluation

No items found

Save

CONTENT MODULES ACTIONS

When a content module is added, a Learning Administrator can perform the following actions by clicking the **Edit Assignment Details** link in the Actions column:

- Edit Assignment Details
- Disable Content Module
- Delete Content Module
- Edit Content Module Details
- Configure Attempts on Content

The following pages will show how to use these actions.

EDIT ASSIGNMENT DETAILS

To change the requirements of the content module, perform the following:

1. Click the **Edit Assignment Details** link associated with the content module.
2. Select **Edit Assignment Details** from the popup bubble.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main Learning Assignments Related Info Policies Delivery Types Notifications Ratings

Learning Assignments
Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content [Add Learning Assignments](#) | [Print](#) | [Export](#)

Up	Down	Type	Name	Details	Requirement	Actions
		Training Content	DDM Seminar Series - April 2014	Attempts on Content Allowed: Unlimited Status: Enabled	Required	Edit Assignment Details

Actions
[Edit Assignment Details](#)
[Disable Content Module](#)
[Delete Content module](#)
[Edit Content Module Details](#)
[Configure Attempts on Content](#)

3. Make changes as needed then click **Save**.

Edit Assignment Details: DDM Seminar Series - April 2014

Assignment Details

Assignment Type: Training Content

Requirement: Required Assignment Optional Assignment

Status: Enabled Disabled

Content Details

Name: DDM Seminar Series - April 2014

Content Status: Published

Sign off:

Mastery Score:

Consider For Overall Score:

Attempts on Content: Unlimited Limited To

DISABLE CONTENT MODULE

To disable the content modules so that learners are unable to access it, perform the following:

1. Click the Edit Assignment Details link associated with the content module.
2. Select Disable Content Module from the popup bubble.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main Learning Assignments Related Info Policies Delivery Types Notifications Ratings

Learning Assignments
Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content [Add Learning Assignments](#) | [Print](#) | [Export](#)

Up	Down	Type	Name	Details	Requirement	Actions
		Training Content	DDM Seminar Series - April 2014	Attempts on Content Allowed: Unlimited Status: Enabled	Required	Edit Assignment Details

Actions
[Edit Assignment Details](#)
[Disable Content Module](#)
[Delete Content module](#)
[Edit Content Module Details](#)
[Configure Attempts on Content](#)

3. The content will be disabled and the status updated as shown below.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main Learning Assignments Related Info Policies Delivery Types Notifications Ratings

Learning Assignments
Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content [Add Learning Assignments](#) | [Print](#) | [Export](#)

Up	Down	Type	Name	Details	Requirement	Actions
		Training Content	DDM Seminar Series - April 2014	Attempts on Content Allowed: Unlimited Status: Disabled	Required	Edit Assignment Details

ENABLE CONTENT MODULES

To enable content that has been previously disabled, perform the following:

1. Click the Edit Assignment Details link associated with the content module.
2. Select Disable Content Module from the popup bubble.

NOTE: This option is only available for content that has been disabled.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main Learning Assignments Related Info Policies Delivery Types Notifications Ratings

Learning Assignments
Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content [Add Learning Assignments](#) | [Print](#) | [Export](#)

Up	Down	Type	Name	Details	Requirement	Actions
		Training Content	DDM Seminar Series - April 2014	Attempts on Content Allowed: Unlimited Status: Disabled	Required	Edit Assignment Details

Actions
[Edit Assignment Details](#)
[Enable Content Module](#) ←
[Delete Content module](#)
[Edit Content Module Details](#)
[Configure Attempts on Content](#)

3. The content will be enabled and the status updated as shown below.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main Learning Assignments Related Info Policies Delivery Types Notifications Ratings

Learning Assignments
Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content [Add Learning Assignments](#) | [Print](#) | [Export](#)

Up	Down	Type	Name	Details	Requirement	Actions
		Training Content	DDM Seminar Series - April 2014	Attempts on Content Allowed: Unlimited Status: Enabled	Required	Edit Assignment Details

DELETE A CONTENT MODULE

To remove a content module from a course, perform the following:

1. Click the **Edit Assignment Details** link associated with the content module.
2. Select **Delete Content Module** from the popup bubble.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main Learning Assignments Related Info Policies Delivery Types Notifications Ratings

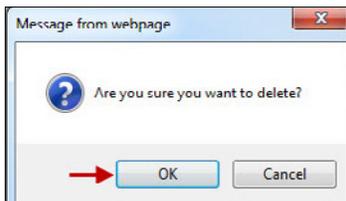
Learning Assignments
Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content [Add Learning Assignments](#) | [Print](#) | [Export](#)

Up	Down	Type	Name	Details	Requirement	Actions
		Training Content	DDM Seminar Series - April 2014	Attempts on Content Allowed: Unlimited Status: Enabled	Required	Edit Assignment Details

Actions
[Edit Assignment Details](#)
[Disable Content Module](#)
[Delete Content module](#) ←
[Edit Content Module Details](#)
[Configure Attempts on Content](#)

3. Click **OK** in the delete confirmation popup message.



4. The content will now be removed from the course as shown below.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main Learning Assignments Related Info Policies Delivery Types Notifications Ratings

Learning Assignments
Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content [Add Learning Assignments](#)

No items found

NOTE: If learners have already accessed the content, it may not be able to be removed. The content should then be discontinued if it cannot be removed.

EDIT CONTENT MODULE DETAILS

The content module details are originally set by the Content Administrator when the content is imported into the LMS. To edit the content module details, perform the following:

1. Click the **Edit Assignment Details** link associated with the content module.
2. Select **Edit Content Module Details** from the popup bubble.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main Learning Assignments Related Info Policies Delivery Types Notifications Ratings

Learning Assignments
Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content Add Learning Assignments | Print | Ex

Up	Down	Type	Name	Details	Requirement	Actions
		Training Content	DDM Seminar Series - April 2014	Attempts on Content Allowed: Unlimited Status: Enabled	Required	Edit Assignment Details

Actions
[Edit Assignment Details](#)
[Disable Content Module](#)
[Delete Content module](#)
[Edit Content Module Details](#)
[Configure Attempts on Content](#)

3. Edit the desired fields then click Save.

Attach Content:

Name* DDM Seminar Series - April 2014

Security Domain* NIH

Content Format SCORM Package

Content Format Version SCORM 1.2

Player Template* Empty Player

Mobile Device Compatibility Not Compatible

Status Published [Edit](#)

Version Number FY14

Available From 05/29/2014

Expiration Date

Parent Folder* NIHTC

Content Provider

Delivery Vendor Saba

External Content ID

Zip File DDM_Seminar_Series_Course.zip [Browse...](#)

Content Server* Test_Saba_Content_Server

Use as Survey, Evaluation, or Multi-Rater Assessment

Is Scoring

Owner [Add Owner](#)

No items found

[Preview Content](#)
[View Content Communication Log](#)

[Save](#) [Back](#)

CONFIGURE ATTEMPTS ON CONTENT

Learning Administrators can configure the number of attempts a learner can have to access the content. The default allows unlimited access but can be changed to a finite number of attempts. To change the number of attempts allowed, perform the following:

1. Click the **Edit Assignment Details** link associated with the content module.
2. Select **Edit Content Module Details** from the popup bubble.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main Learning Assignments Related Info Policies Delivery Types Notifications Ratings

Learning Assignments
Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content [Add Learning Assignments](#) | [Print](#) | [Ex](#)

Up	Down	Type	Name	Details	Requirement	Actions
<input type="radio"/>	<input type="radio"/>	Training Content	DDM Seminar Series - April 2014	Attempts on Content Allowed: Unlimited Status: Enabled	Required	Edit Assignment Details

Actions
Edit Assignment Details
Disable Content Module
Delete Content module
Edit Content Module Details
Configure Attempts on Content

3. Select the radio button for **Limited attempts**.
4. Enter the number of attempts the learner will be allowed.
5. Click the **Save** button.

Configure Attempts on Content

Use these options to limit the number of attempts a learner may make to complete a content module. Learners will be told how many attempts they have remaining when the content is launched. Once exhausted, the number of attempts maybe reset by a People Administrator from completed courses page (for completed learning) or from the enrollments page (for incomplete learning).

Unlimited(default). The learner may make unlimited attempts.

Limited. The learner may launch the content a specified number of times before the content is locked.

Maximum attempts allowed:

NOTE: If the content is limited and you want to allow the learners unlimited access, select the Unlimited(default) radio button and then click the **Save** button.

6. Click **OK**.

Message from webpage

Any unsaved changes in the offering will be lost if the number of attempts allowed on content is set. Press OK to continue.

7. The attempts allowed will be updated and shown in the Details column.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main Learning Assignments Related Info Policies Delivery Types Notifications Ratings

Learning Assignments
Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content [Add Learning Assignments](#) | [Print](#) | [Export](#)

Up	Down	Type	Name	Details	Requirement	Actions
		Training Content	DDM Seminar Series - April 2014	Attempts on Content Allowed: 3 Status: Enabled	Required	Edit Assignment Details

ADD AN EVALUATION TO A COURSE - OPTIONAL

Learning Administrators can add an evaluation to the course that will be available to the learners in the LMS. Evaluations must first be created by a Content Administrator before they may be attached to a course. To add an evaluation to the course, perform the following:

1. Click the **Add Evaluation link** in the Evaluations section.

Course Details: NIH LMS Training Sample, #NIHLMS00001

- Main
- Learning Assignments**
- Related Info
- Policies
- Delivery Types
- Notifications
- Ratings

Learning Assignments

Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content

[Add Learning Assignments](#) | [Print](#) | [Export](#)

Up	Down	Type	Name	Details	Requirement	Actions
		Training Content	DDM Seminar Series - April 2014	Attempts on Content Allowed: 3 Status: Enabled	Required	Edit Assignment Details

Evaluations

Add evaluations that the learner must complete after all learning assignments are completed.

Launch evaluation on completion

Evaluation

[Add Evaluation](#)

No items found

2. Enter search criteria for the evaluation then click the **Search button**.
3. Click the **checkbox** associated with the evaluation then click the **Next button**.

Attach Evaluation: NIH LMS Training Sample

Search **Browse**

Folder Type: Name: →

Version Number: Content Format:

Content Type: Language:

Author: Keywords:

Folder Name: Available From >=:

Available From <=: Last Modified On >=:

Last Modified On <=: Competency:

Owner: Content Provider:

Delivery Vendor: Include non-scoring content modules:

→

Contents

Showing 1 out of 1 results

Select	Name	Version Number	Content Format	Folder Name
<input checked="" type="checkbox"/>	NII ITC Evaluation	FY2011	SCORM Package	NII ITC

→

4. Choose the settings for when the evaluation should be launched then click the **Save button**.

Attach Evaluation: NIH LMS Training Sample

Evaluation

Name	Status	Event
NIHTC Evaluation	Published	Launch Evaluation: <input type="radio"/> On Registration <input checked="" type="radio"/> Only after the Learner has been marked Complete <input type="radio"/> N = <input type="text"/> Days after the Learner has been marked Complete <input type="radio"/> Use Domain Level Evaluation Availability setting: (Based on offering type used)

→

5. The evaluation will be displayed in the Evaluations section.

- Click the **evaluation name** to preview the evaluation content.
- Click the **Edit link** to change the evaluation launch settings in step 4.
- Click the **Delete link** to delete the survey.

Evaluations
Add evaluations that the learner must complete after all learning assignments are completed.

Launch evaluation on completion

Evaluation [Add Evaluation](#) | [Print](#) | [Export](#)

Module	Status	Event	Actions
NIHTC Evaluation	Published	Only after the Learner has been marked Complete	Edit Delete

[Save](#)

RELATED INFO TAB

The Related Info tab allows additional information to be added to the course. The sections on this tab are not required to save the course however there are two that will aid learners in searching for the course. They are Category and Keywords. It is recommended that these two sections be updated to ensure that the course can be found by learners.

Below you will find a graphic of the entire Related Info tab.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main	Learning Assignments	Related Info	Policies	Delivery Types	Notifications	Ratings
Attachments Add Attachment						
No items found						
Notes Add Notes						
No items found						
Category Add Category						
No items found						
Competency Add Competency						
No items found						
Catalog Prerequisites Add Prerequisites						
No items found						
Equivalents Add Equivalents						
No items found						
Keywords Add Keyword						
No items found						
Continuing Education Credits Add Field of Study Print Export Modify Table						
Field of Study	Description	Default Credits	Actions			
Total Credits:		0				
Certifications						
No items found						
Curricula						
No items found						
Learning Recommendations Add Recommendations						
No items found						
Certificate Templates Add Certificate Templates						
No items found						
Provider Information Print Export Modify Table						
	User Name	Date				
Created by	nihlearningadmin	02/26/2015				
Updated by	nihlearningadmin	02/26/2015				

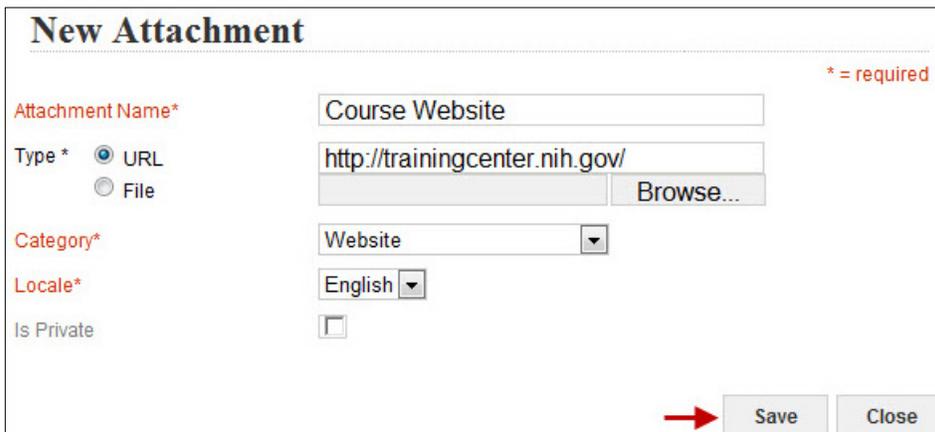
ADDING ATTACHMENTS

1. Click the **Add Attachment** link.



Attachments → Add Attachment
No items found

2. Enter a name for the attachment in the **Attachment Name** field.
 3. Click the radio button for a Type.
 - URL – Type the URL for the website being used as an attachment.
 - File – Click Browse to search your computer and find the file to be used as an attachment.
- NOTE:** When using files as attachments, be sure to use a format that is widely accepted. Formats such as PDF are recommended since most computers can open files in that format.
4. Select a **Category**.
 5. **Locale** should be English which is selected by default.
 6. **Is Private** – Click this checkbox to make the attachment available only to those registered for the course.
 7. Click the **Save** button.



New Attachment * = required

Attachment Name*

Type * URL File

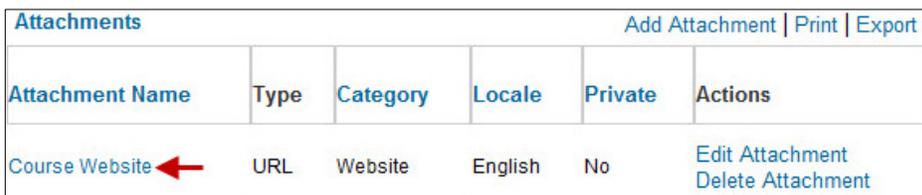
Category*

Locale*

Is Private

→

8. Click the **attachment name** link to make sure that it launches correctly.



Attachments		Add Attachment Print Export			
Attachment Name	Type	Category	Locale	Private	Actions
Course Website ←	URL	Website	English	No	Edit Attachment Delete Attachment

EDIT AN ATTACHMENT

1. Click **Edit Attachment** in the Actions column.

Attachments						Add Attachment Print Export
Attachment Name	Type	Category	Locale	Private	Actions	
Course Website	URL	Website	English	No	Edit Attachment ← Delete Attachment	

2. Edit attachment details then click the **Save button**.

New Attachment

* = required

Attachment Name*

Type * URL File

Category* ▼

Locale* ▼

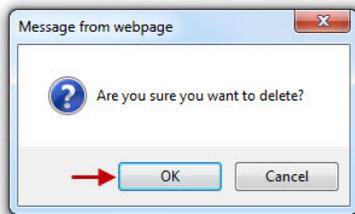
Is Private

DELETE AN ATTACHMENT

1. Click Delete Attachment in the Actions column.

Attachments						Add Attachment Print Export
Attachment Name	Type	Category	Locale	Private	Actions	
Course Website	URL	Website	English	No	Edit Attachment Delete Attachment ←	

2. Click **OK** in the popup window.



3. The attachment will now be deleted from the course.

ADD A CATEGORY TO A COURSE - RECOMMENDED

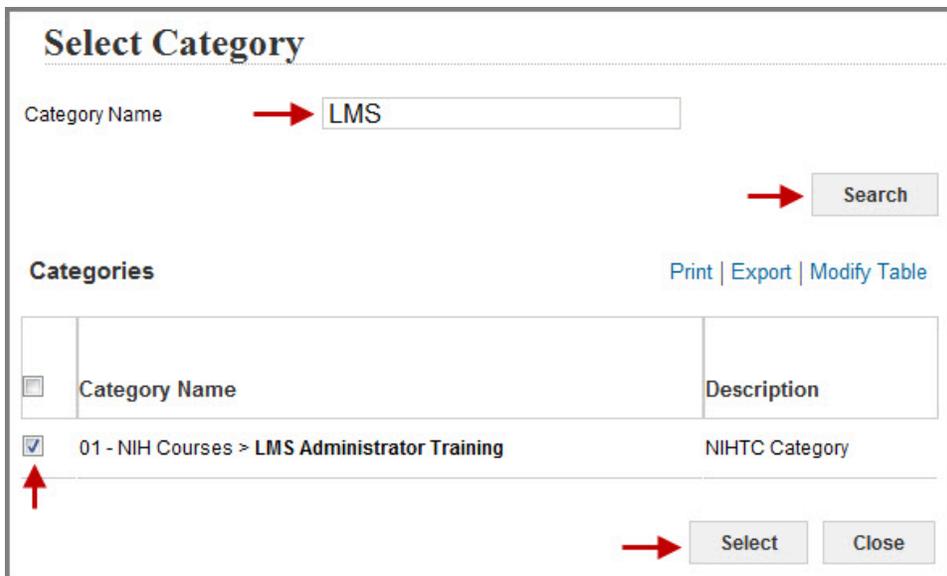
Categories give learners an alternative way to search for courses. It is recommended that every course be associated with at least one category. Categories must be created before they can be added as described below.

1. Click the **Add Category** link.



The screenshot shows a header area with the title "Category" and a blue link "Add Category" with a red arrow pointing to it. Below the header is a search bar containing the text "No items found".

2. Type the name of the category in the **Category Name** field.
3. Click the **Search** button.
4. Click the **checkbox** associated with the category being added.
5. Click the **Select** button.



The screenshot shows a "Select Category" dialog box. It has a "Category Name" field with "LMS" entered and a "Search" button. Below the search bar is a table of categories. The first row is selected, and a "Select" button is highlighted with a red arrow.

<input type="checkbox"/>	Category Name	Description
<input checked="" type="checkbox"/>	01 - NIH Courses > LMS Administrator Training	NIHTC Category

6. The category will now be associated with the course.



The screenshot shows the "Category" management interface with the newly added category in the table. The table has columns for "Name", "Description", and "Actions".

Name	Description	Actions
LMS Administrator Training	NIHTC Category	Delete

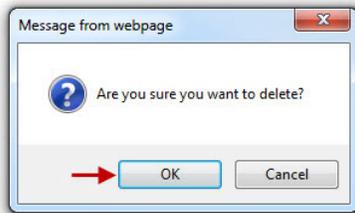
7. Repeat these steps to add additional categories as needed.

DELETE A CATEGORY

1. Click the Delete link in the Actions column that is associated with the category being deleted.

Category			Add Category Print Export Modify Table
Name	Description	Actions	
LMS Administrator Training	NIHTC Category	 Delete	

2. Click **OK** in the popup window.



3. The category will no longer be associated with the course.

ADDING A COMPETENCY

Competencies are a set of skills or knowledge that can be defined, measured, and tracked. Adding a competency to the course will allow that competency to be added to a learner as a required competency when they earn a successful completion for the course.

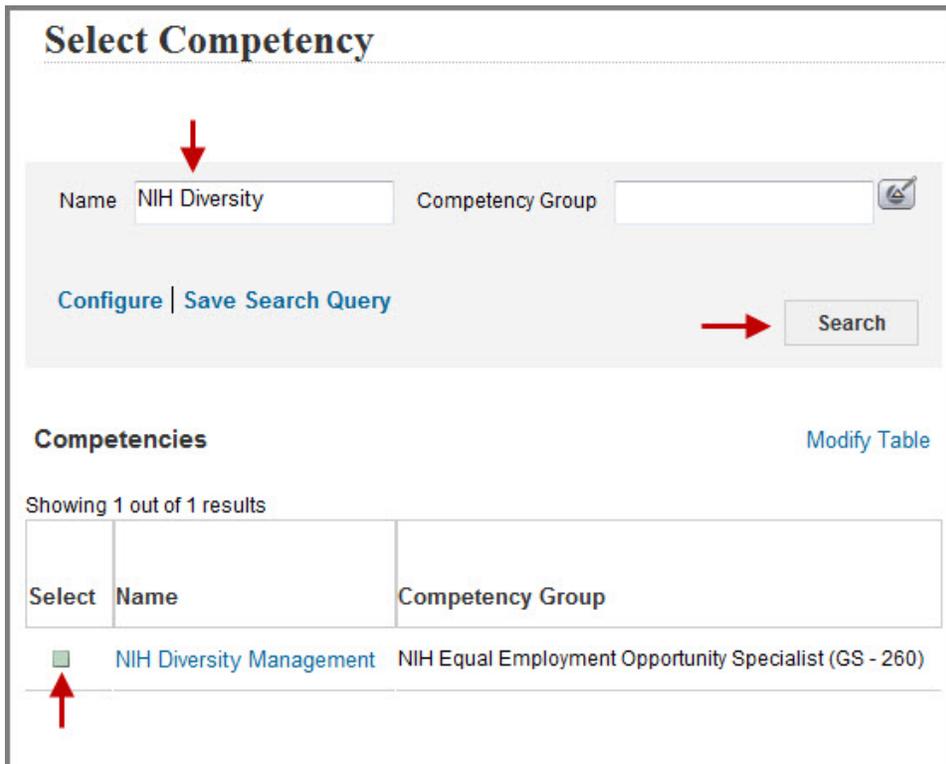
1. Click the **Add Competency link**.



Competency → Add Competency

No items found

2. Enter search criteria for the competency then click the **Search button**.
3. Click the **checkbox** associated with the competency.



Select Competency

Name Competency Group

[Configure](#) | [Save Search Query](#) → Search

Competencies [Modify Table](#)

Showing 1 out of 1 results

Select	Name	Competency Group
<input type="checkbox"/>	NIH Diversity Management	NIH Equal Employment Opportunity Specialist (GS - 260)

4. Select a **Minimum Proficiency Level** from the drop-down menu.
5. Click the **Save** button.

NOTE: Click the Attachment Name to view any additional information about the competency.

Competency Detail: NIH Diversity Management

Competency Name NIH Diversity Management

Minimum Proficiency Level* Fundamental Awareness - 1

Attachments [Print](#) | [Export](#)

Attachment Name	Type	Category	Locale	Private
Diversity management Key Behaviors	File	Map	English	No

Save
Back
Close

6. The competency will now be associated with the course as shown below.

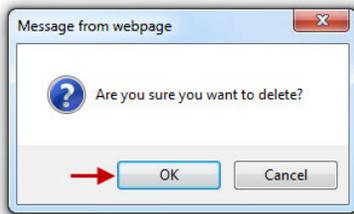
Competency		Add Competency Print Export Modify Table	
Name	Description	Level	Actions
NIH Diversity Management	Understands and applies the principles of creating a diverse and inclusive work environment where people from diverse backgrounds feel respected, recognized, and valued	Fundamental Awareness	Delete

DELETE A COMPETENCY

1. Click the **Delete link** in the Actions column.

Competency Add Competency Print Export Modify Table			
Name	Description	Level	Actions
NIH Diversity Management	Understands and applies the principles of creating a diverse and inclusive work environment where people from diverse backgrounds feel respected, recognized, and valued	Fundamental Awareness	Delete

2. Click **OK** in the popup window.



3. The competency will no longer be associated with the course.

ADDING A COURSE PREREQUISITE

A course prerequisite will cause the LMS to require that learners successfully complete a specific course prior to registering for this course.

1. Click the **Add Prerequisites link**.

Catalog Prerequisites Add Prerequisites
No items found

2. Enter search criteria for the prerequisite course then click the **Search button**.
3. Click the **Add Required checkbox** for the prerequisite course.

NOTE: The Add Recommended option will recommend the prerequisite but still permit learners to register even if it has not been completed.

NOTE: You can also add a certification or a curriculum as a prerequisite to a course.

Select Course Prerequisites

Courses | Certificates | Curricula

Course ID Title

Domain Recurring Course

[Configure](#) | [Save Search Query](#)

Prerequisites [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

Add Required	Add Recommended	Title	Version	Course ID
<input type="checkbox"/>	<input type="checkbox"/>	NIH LMS Entering The CAN On An Order	FY13	NIHTC1009

4. The course prerequisite will now be added to the course.

Catalog Prerequisites [Add Prerequisites](#) | [Print](#) | [Export](#) | [Modify Table](#)

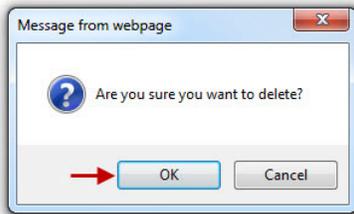
Title	Type	Version	ID	Required/Recommended	Actions
NIH LMS Entering The CAN On An Order	Course	FY13	NIHTC1009	Required	Delete

DELETING A PREREQUISITE

1. Click the **Delete** link in the Actions column.

Catalog Prerequisites					Add Prerequisites Print Export Modify Table
Title	Type	Version	ID	Required/Recommended	Actions
NIH LMS Entering The CAN On An Order	Course	FY13	NIHTC1009	Required	 Delete

2. Click **OK** in the Popup window.



5. The prerequisite will no longer be associated with the course.

ADDING EQUIVALENTS TO A COURSE

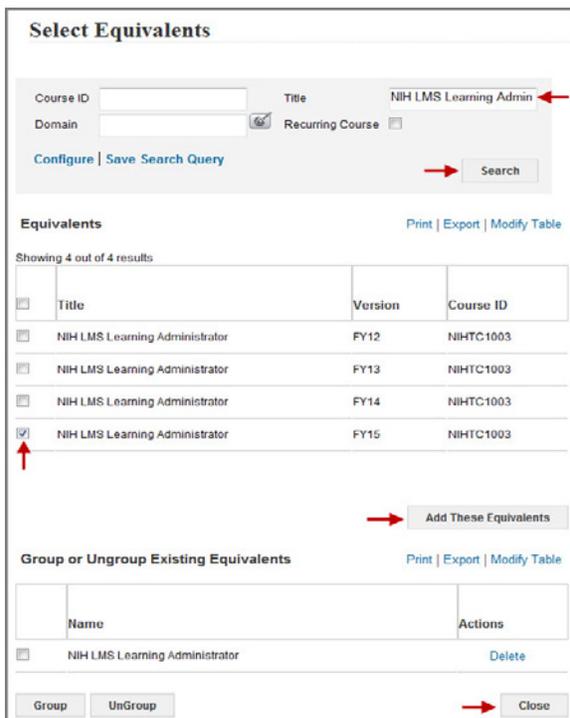
Equivalents are courses that meet the same objectives and cover the same content. Courses can be made equivalent but the equivalence is not automatically reciprocal. Contact the course owner for more detail on the course content that is being made equivalent to this course.

1. Click the **Add Equivalents link**.



The screenshot shows a box titled "Equivalents" with a red arrow pointing to the "Add Equivalents" link in the top right corner. Below the title, it says "No items found" in a light gray box.

2. Enter search criteria for the course(s) being made equivalent to this course then click the **Search button**.
3. Select the **checkbox** associated with the course being identified as a prerequisite.
4. Click the **Add These Equivalents button**.



The screenshot shows the "Select Equivalents" form. At the top, there are input fields for "Course ID" and "Title" (containing "NIH LMS Learning Admin"), a "Domain" field, and a "Recurring Course" checkbox. A red arrow points to the "Search" button. Below the search fields, there is a table titled "Equivalents" with columns for "Title", "Version", and "Course ID". The table shows four rows, with the first three having unchecked checkboxes and the fourth having a checked checkbox. A red arrow points to the checked checkbox. Below the table is an "Add These Equivalents" button with a red arrow pointing to it. At the bottom, there is a "Group or Ungroup Existing Equivalents" section with a table showing one row with a checked checkbox and a "Delete" link. A red arrow points to the "Close" button at the bottom right.

5. Repeat steps 2 through 4 to add additional prerequisites.
6. Click the **Close button**.



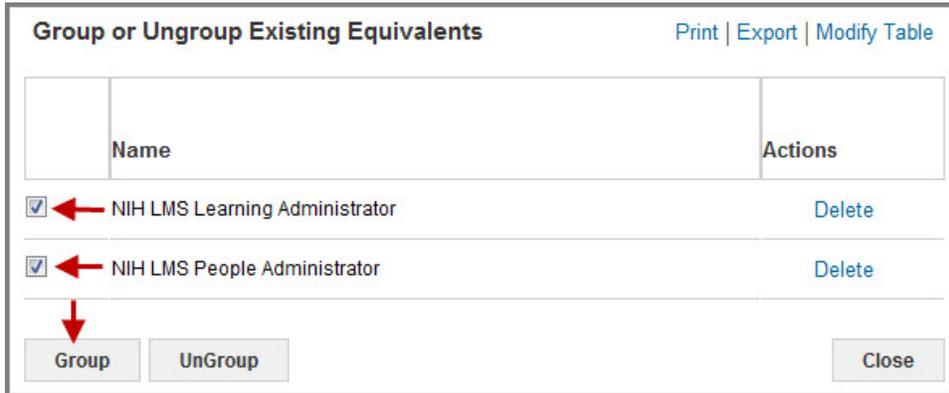
The screenshot shows the "Equivalents" section with a table. The table has two columns: "Name" and "Actions". The first row contains "NIH LMS Learning Administrator FY15" and a "Delete" link. A red arrow points to the "Delete" link.

7. The learning items will be added to the course.

GROUPING ITEMS AS A SINGLE EQUIVALENT - OPTIONAL

If two or more courses have been added as equivalents, they can be combined so that they all become equivalent to this course. To group multiple courses together as a single equivalent, follow the directions below.

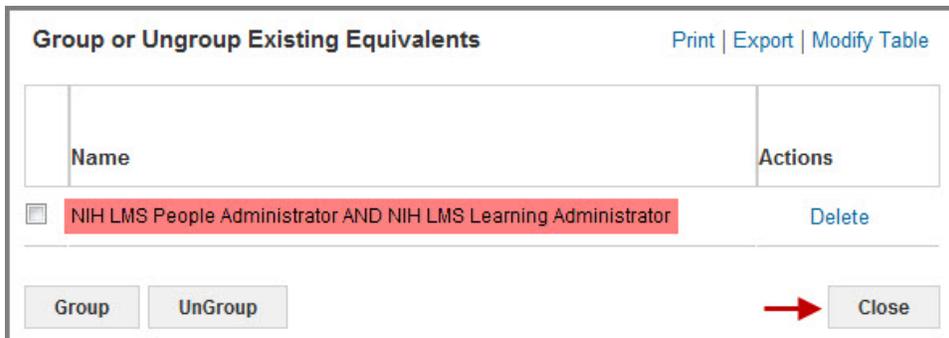
1. Select the courses that will be equivalents to this course by clicking their associated **checkboxes**.
2. Click the **Group** button.



	Name	Actions
<input checked="" type="checkbox"/>	NIH LMS Learning Administrator	Delete
<input checked="" type="checkbox"/>	NIH LMS People Administrator	Delete

Group UnGroup Close

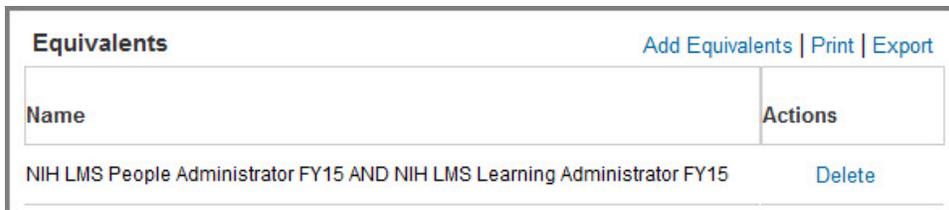
3. The previously selected courses will be merged into one unit.



	Name	Actions
<input type="checkbox"/>	NIH LMS People Administrator AND NIH LMS Learning Administrator	Delete

Group UnGroup Close

4. The LMS will require both of the grouped courses to be complete in order to satisfy the equivalency.
5. Click **Close** when finished.



Name	Actions
NIH LMS People Administrator FY15 AND NIH LMS Learning Administrator FY15	Delete

6. The equivalents are now added to the course.

DELETE AN EQUIVALENT FROM A COURSE

1. Click the **Delete link** in the Actions column.

Equivalents		Add Equivalents Print Export
Name	Actions	
NIH LMS People Administrator FY15 AND NIH LMS Learning Administrator FY15	 Delete	

2. The equivalency will be deleted. There is no confirmation screen for this action.

ADDING KEYWORDS TO A COURSE - RECOMMENDED

Keywords allow the LMS to reference the course when a learner types something other than the actual course name in their search. Using relevant keywords will make this course easier to find. Keywords and phrases may also be used.

1. Click the **Add Keyword link**.

Keywords	 Add Keyword
No items found	

2. Enter search criteria for the keyword then click the **Search button**.
3. Click the **checkbox** associated with the keyword.
4. Click the **Select button**.

Select Keywords	
Name:	 <input type="text" value="LMS Training"/>
Search Course	<input type="text"/> 
	 <input type="button" value="Search"/>
Keywords	Create Keywords Print Export Modify Table
<input type="checkbox"/>	Add Keyword
<input checked="" type="checkbox"/>	LMS Training
	
	 <input type="button" value="Select"/> <input type="button" value="Close"/>

NOTE: If the keyword desired is not found, do the following:

5. Click the **Create Keywords** link.

Select Keywords

Name:

Search Course

Keywords [Create Keywords](#)

No items found

6. Enter the new keyword in the **Keyword field**.

7. Click the **Add button**.

Add Keywords

Keyword* * = required

8. The keyword will be displayed in the keywords section.

9. Repeat the steps above to add additional keywords as needed.

ADDING CONTINUING EDUCATION CREDITS TO A COURSE

Fields of study such as Supervisory Training are ways to classify certain kinds of courses. Fields of study can also be used to issue credits for the completion of a course. It is recommended that Learning Administrators contact their management teams to determine if a course is eligible to have credits associated with it and if so, how many. Follow the steps below to add a field of study to a course.

1. Click the **Add Field of Study** link.

Continuing Education Credits [Add Field of Study](#) | [Print](#) | [Export](#) | [Modify Table](#)

Field of Study	Description	Default Credits	Actions
Total Credits:		0	

2. Click the Pick Icon for the Field of Study field.

Add Credits by Field of Study

Field of Study*  

Default Credits*

Instructor Credits

Credits by Job Roles [Add Job Role](#)

No items found

Learners who do not have any associated role receive default credits.

3. Type the name of the field of study in the **name field**.
4. Click the **Search button**.
5. Click the **checkbox** associated with the field of study.

Select Field of Study

Name Description

[Configure](#) | [Save Search Query](#) 

Select Field of Study [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

	Name	Description
<input type="checkbox"/>	NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH



6. Enter the number of **Default Credits** that will be earned when the course is successfully completed. This is usually equal to the number of hours of training.
7. Click the **Save button**.

Add Credits by Field of Study

Field of Study*

Default Credits*

Instructor Credits

Credits by Job Roles [Add Job Role](#)

No items found
Learners who do not have any associated role receive default credits.

8. After the screen refreshes, click the **Close button**.

Edit Credits for NIH Supervisory CLPs

Field of Study

Default Credits*

Instructor Credits

Credits by Job Roles [Add Job Role](#)

No items found
Learners who do not have any associated role receive default credits.

9. The field of study will now appear on the Related Info tab.

EDIT FIELD OF STUDY

1. Click the **Edit Credits link** in the Actions column.

Continuing Education Credits			
Add Field of Study Print Export Modify Table			
Field of Study	Description	Default Credits	Actions
NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH	8	Edit Credits Delete Credits
Total Credits:		8	

2. Make all necessary changes then click the **Save button**.

Edit Credits for NIH Supervisory CLPs

Field of Study: NIH Supervisory CLPs

Default Credits*:

Instructor Credits:

Credits by Job Roles [Add Job Role](#)

No items found

Learners who do not have any associated role receive default credits.

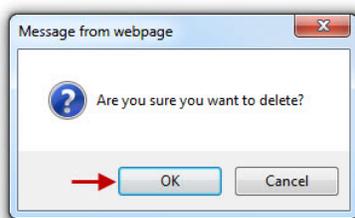
3. When the screen refreshes, click the **Close button**.

DELETE FIELD OF STUDY

1. Click the **Delete Credits** link in the Actions column.

Continuing Education Credits Add Field of Study Print Export Modify Table			
Field of Study	Description	Default Credits	Actions
NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH	8	Edit Credits Delete Credits
Total Credits:		8	

2. Click **OK** in the popup window.



3. The field of study will now be deleted from the course.

ADD LEARNING RECOMMENDATIONS - OPTIONAL

Learning Administrators can recommend other learning items to learners. These recommendations can be made to the learner in three instances:

- When the course is added to the learner's learning plan
- When the learner registers for the course
- When the learner completes the course

Follow the instructions below to recommend another course to a learner upon completing this course. The process is very similar when adding other types of learning items.

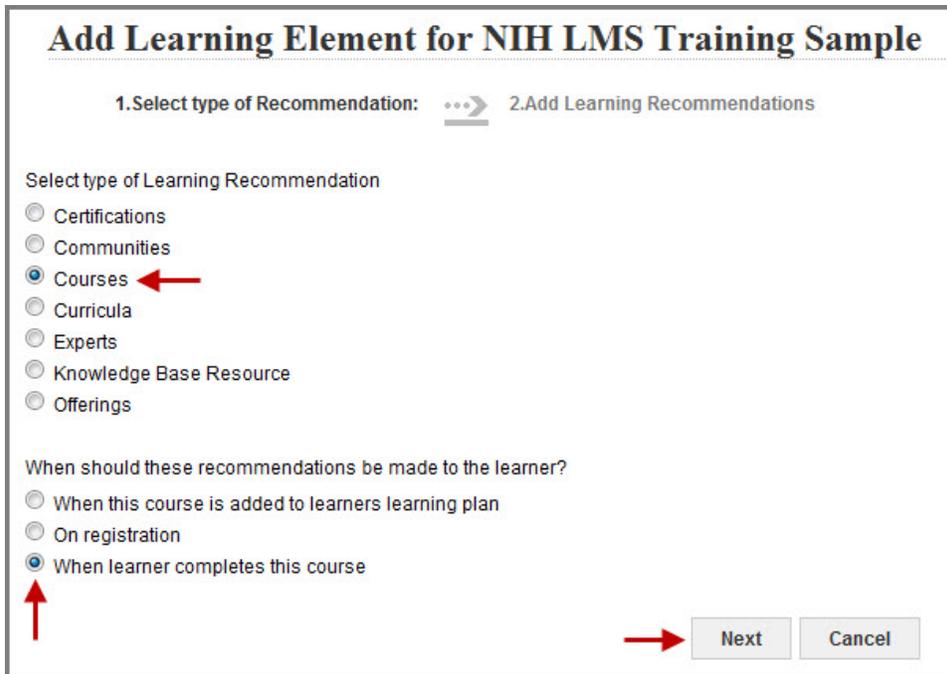
1. On the Related Info tab, click the **Add Recommendations link**.



2. Select the radio button for **Courses**.

3. Select the radio button for **When learner completes this course**.

4. Click the **Next button**.

A screenshot of a form titled "Add Learning Element for NIH LMS Training Sample". The form has two steps: "1. Select type of Recommendation:" and "2. Add Learning Recommendations". Under step 1, there is a section "Select type of Learning Recommendation" with radio buttons for "Certifications", "Communities", "Courses", "Curricula", "Experts", "Knowledge Base Resource", and "Offerings". The "Courses" option is selected and has a red arrow pointing to it. Below this is a section "When should these recommendations be made to the learner?" with radio buttons for "When this course is added to learners learning plan", "On registration", and "When learner completes this course". The "When learner completes this course" option is selected and has a red arrow pointing to it. At the bottom right, there are "Next" and "Cancel" buttons, with a red arrow pointing to the "Next" button.

5. Enter search criteria for the recommended course.

6. Click the **Search button**.

7. Click the **checkbox** to the left of the course being recommended.

8. Click the **Select button**.

Add Learning Element for NIH LMS Training Sample

1. Select type of Recommendation: ➤ 2. Add Learning Recommendations

Select courses to recommend when learner completes this course

Title Course ID ➔

Domain Audience Type/Subtype

[Configure](#) | [Save Search Query](#) ➔

Courses [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

	Version	Course ID	Title
<input checked="" type="checkbox"/>	FY15	NIHTC1003	NIH LMS Learning Administrator

➔

9. The course will now be added as a learning recommendation.

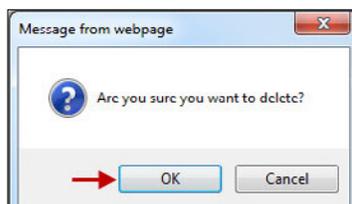
Learning Recommendations				Add Recommendations Print Export
Recommendation	Recommendation Type	Recommended When	Actions	
NIH LMS Learning Administrator	Courses	Course Completed	Delete	

DELETING A LEARNING RECOMMENDATION

1. Click the **Delete** link for the learning recommendation being deleted.

Learning Recommendations				Add Recommendations Print Export
Recommendation	Recommendation Type	Recommended When	Actions	
NIH LMS Learning Administrator	Courses	Course Completed	➔ Delete	

2. Click **OK** in the confirmation popup window.



3. The recommendation will no longer be made to learners taking this course.

POLICIES TAB

The Policies tab allows you to configure a number of options related to the course. The following may be specified for all courses:

- Languages
- Price List (**NOT USED AT NIH**)
- Approval Policies
- Recurring Registration Policies
- Completion Policies

SPECIFYING LANGUAGES FOR COURSES - OPTIONAL

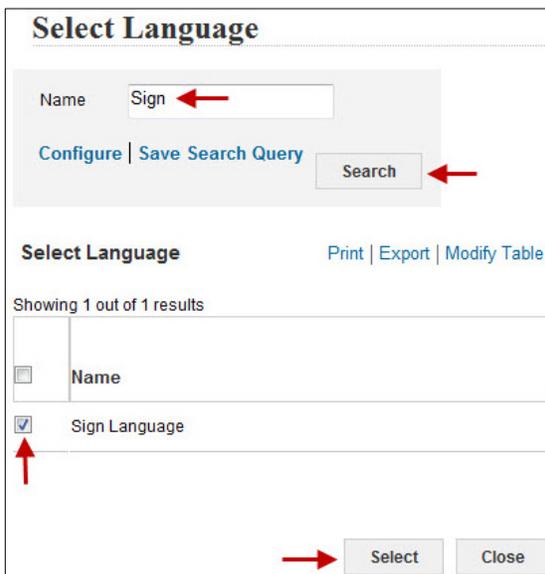
The available languages for all courses are specified on the Policies tab at the course level. The Add Language link can be used to add a list of languages in which courses will be provided. A language for a specific offering is set on the Main tab at the offering level. Follow the steps below to add a new language to the course.

1. Click the **Add Language link**.



The screenshot shows a table titled "Available Languages" with a header row containing "Language" and "Actions". Below the header, there is one row with the language "English" and a "Delete" link in the Actions column. Above the table, there are links for "Add Language", "Print", "Export", and "Modify Table". A red arrow points to the "Add Language" link.

2. Enter search criteria for the language then click **Search**.
3. Click the **checkbox** associated with the language.
4. Click **Select**.



The screenshot shows a "Select Language" dialog box. At the top, there is a search input field with "Sign" entered and a red arrow pointing to it. Below the input field are links for "Configure", "Save Search Query", and a "Search" button with a red arrow pointing to it. The dialog box displays "Showing 1 out of 1 results" and a table with one row: "Sign Language" with a checked checkbox in the first column and a red arrow pointing to it. At the bottom of the dialog box, there are "Select" and "Close" buttons, with a red arrow pointing to the "Select" button.

5. The language will now be added to the course which can be selected when creating an offering.



The screenshot shows the "Available Languages" table after the new language has been added. The table now has three rows: "English", "Sign Language", and "English". Each row has a "Delete" link in the Actions column. The "Add Language", "Print", "Export", and "Modify Table" links are still present at the top of the table.

DELETING A LANGUAGE

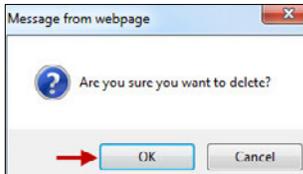
Any added language may be deleted but English should always remain as the default.

1. Click the **Delete** link in the Actions columns.



Available Languages Add Language Print Export Modify Table	
Language	Actions
Sign Language	Delete
English	Delete

2. Click **OK** in the confirmation popup window.



3. The language will no longer be associated with the course.
4. Click the **Save** button to save all changes.

SPECIFYING APPROVAL POLICIES FOR COURSES

Learning Administrators can manage the approval requirements for a course from the Policies tab. The options available are explained below:

- **Do not override domain setting** – This option uses the default domain settings to determine the approval requirements. The default setting may be different depending on the domain your course resides in.
- **Manager Approval Required to Register** – This option requires a manager or alternate manager to approve registrations for the course.
- **Manager Approval and Designated Additional Approval Required to Register** – This option requires the manager/alternate manager and Additional Approver on Orders to approve registrations for the course.
- **Manager Approval Not Required to Register** – This option will allow learners to register without manager approval.



Manager Approval Required to Register

Do not Override Domain setting (Currently set to: No, Manager Approval Not Required)

Manager Approval Required to Register

Manager Approval and Designated Additional Approval Required to Register

Manager Approval Not Required to Register

Cancellation of pending approval before days

Once the manager approval requirement has been selected, click the Save button located at the bottom right part of the screen.

NOTE: The approval requirement can also be changed at the offering level.

SPECIFYING RECURRING REGISTRATION POLICIES FOR COURSES

Recurring Registration settings allow Learning Administrators to indicate whether or not a learner can register for a class more than once and when that registration can be performed.

- **Do not override domain setting** – This option uses the domain setting to determine recurring registration status and will vary depending upon the domain the course resides in.
- **Allow recurring registration** – This setting allows a learner to reregister for a course even if they have already successfully completed it.
- **Do not allow recurring registration if the current registration is:**
 - *In-Progress or Successfully Completed:* This option prevents a learner from registering for the course when it is in the learner's enrollments or has already been successfully completed.
 - *In-Progress or Completed:* This option prevents a learner from registering for the course when it is in the learner's enrollments or has already been completed successfully or unsuccessfully.
 - *In-Progress:* This option prevents a learner from registering for the course only when the course is in the learner's enrollments.

Recurring Registration

Do not Override Domain setting (Currently set to: Do not allow recurring registration if existing registration is In-Progress or successfully completed)

Allow recurring registrations

Do not allow recurring registration if current registration is In-Progress or successfully completed

- In-Progress or successfully completed
- In-Progress or completed
- In-Progress

1. Once the Recurring Registration option has been selected, click the **Save button** at the bottom right part of the screen.

NOTE: The approval requirement can also be changed at the offering level.

Specifying Completion Policies For Courses

SPECIFYING COMPLETION POLICIES FOR COURSES

Learning Administrators can choose to override the default business rule that specifies who is able to mark a course complete.

Select from the following options:

Do you want to override Completion Policy set at Delivery Mode level? -

Select this checkbox to override the domain default settings.

- Learner can mark complete – This option allows learners to mark the course complete.
- Manager can mark complete – This option allows managers and alternate managers to mark offerings complete for their employees.

Change Completion Status – This option automatically changes the learner’s status in an offering after a specified number of days if the offering has not been manually marked completed.

- Click the checkbox to use this option.
- Enter the number of days the LMS will wait before changing the status.
- Select the status that will be entered for learners by the LMS.
The statuses available in the drop-down menu are Successful and Unsuccessful.

The screenshot shows a form titled "Completion Policy". At the top, there is a checkbox labeled "Do you want to override Completion Policy set at domain level. (Currently: Manager can mark complete)". Below this are two checkboxes: "Learner can mark complete" and "Manager can mark complete". A section titled "If for any reason the offering is not completed" contains a checkbox "Change completion status automatically after specified number of days to the specified status, if the offering has not been manually marked complete". Under this checkbox, there is a "Days" input field and a "Status" dropdown menu. The dropdown menu is open, showing the options: "Select One", "Successful", and "Unsuccessful".

Once the Recurring Registration option has been selected, click the **Save button** at the bottom right part of the screen.

NOTE: These settings can also be changed at the offering level.

DELIVERY TYPES TAB

Delivery Types represent the various methods by which a course's content will be delivered. When a Delivery Type is associated with a course, it inherits the basic properties of that course. These properties remain the same regardless of the method by which the course content is delivered (e.g., course description, vendor, course owner, etc.)

Each Delivery Type can have an unlimited number of learning offerings associated with it. The information you specify for the specific Delivery Type is inherited by all learning offerings created for that delivery method (e.g., all offerings associated with the Instructor Led Delivery Type for a specific course will be 8 hours in duration).

At this level, you may also define a list of resources that can be associated with all offerings of a specific delivery type, in addition to information on scheduling policies, such as audience type, price, and drop policy.

Delivery types fall into three categories:

Self-Paced— delivered through the LMS as online content

Scheduled—have a time and location associated with them

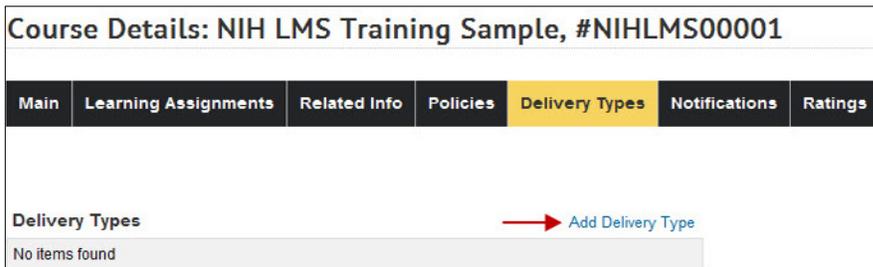
Physical—materials used to deliver training (e.g., manuals, CDs, DVDs, etc.)

A course may have multiple Delivery Types but cannot have a duplicate delivery type. Choose a delivery type that best fits the course you are offering.

IMPORTANT! If the existing delivery types do not apply to the type of offering that you plan to deliver, please contact the NIH LMS Team for assistance.

ADD A DELIVERY TYPE TO A COURSE - REQUIRED

1. Click the Add Delivery Type **link**.



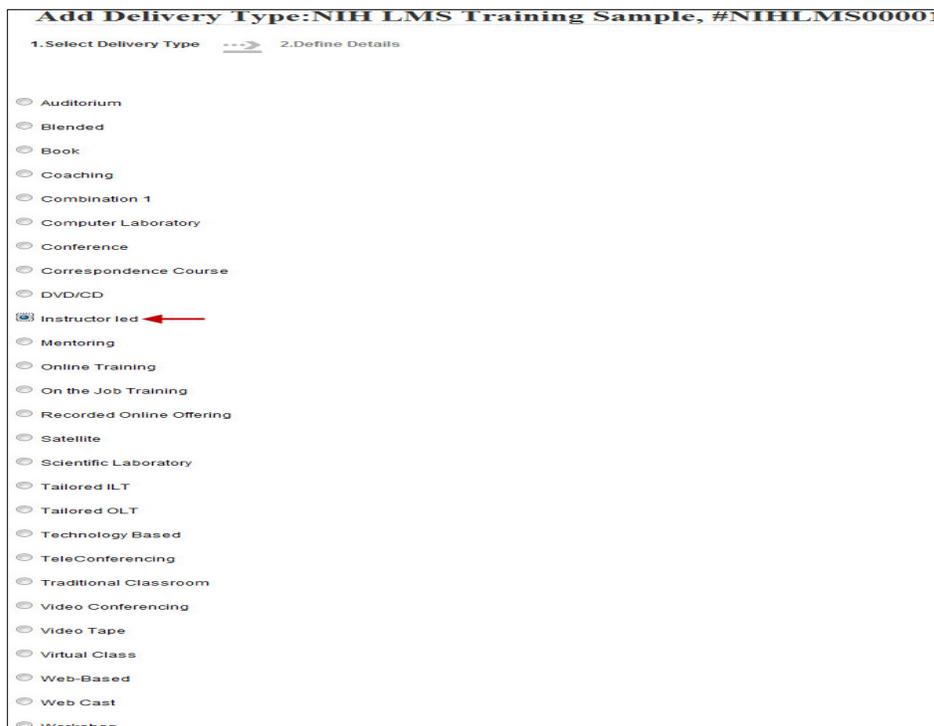
Course Details: NIH LMS Training Sample, #NIHLMS00001

Main	Learning Assignments	Related Info	Policies	Delivery Types	Notifications	Ratings
------	----------------------	--------------	----------	----------------	---------------	---------

Delivery Types → Add Delivery Type

No items found

2. Click the **radio button** for the delivery type being added.
3. Click the **Next button** at the bottom of the screen.



Add Delivery Type: NIH LMS Training Sample, #NIHLMS00001

1. Select Delivery Type --> 2. Define Details

- Auditorium
- Blended
- Book
- Coaching
- Combination 1
- Computer Laboratory
- Conference
- Correspondence Course
- DVD/CD
- Instructor Led
- Mentoring
- Online Training
- On the Job Training
- Recorded Online Offering
- Satellite
- Scientific Laboratory
- Tailored ILT
- Tailored OLT
- Technology Based
- TeleConferencing
- Traditional Classroom
- Video Conferencing
- Video Tape
- Virtual Class
- Web-Based
- Web Cast
- Workshop

NOTE: The non-required fields that display will vary based on the individual Delivery Type. Some information will be pre-populated based on what is defined at the course level.

4. Enter a unique **ID**. (Examples: ILT or OLT for Instructor Led and Online Training)
5. The **domain** should be identical to the domain used at the course level.
6. Enter the **duration** (number of hours) for the course. The format for the duration is **##:##** (Example 16:00)
7. Adjust data in the remaining fields as needed then click the **Finish button**.

IMPORTANT! Entering a price in the **Delivery Price** field will supersede the price specified at the Course level. If the Offerings associated with this Delivery Type are free of charge, enter "0" in this field.

New Instructor led Delivery Mode : NIH LMS Training Sample, #NIHLMS00001

For more details on the OPM standard EHRI Values click [here](#).

1. Select Delivery Type >>> 2. Define Details

Delivery Mode Information	
Title	NIH LMS Training Sample
ID* NIHLMS00001	ILT
Domain*	NIH Common 
Description	<input type="text"/>
	<small>Character Limit 255</small>
Course Description	This course is designed to show Learning Administrators how to build and manage a catalog of courses in LMS.
Duration(HH:MM)*	16:00

Pricing Information	
Currency	US Dollars 
Base Price	0.00 (Inherited from Course)
Delivery Price	<input type="text"/>
Multi-Currency Pricing	<input checked="" type="radio"/> This Delivery Mode is available only in inherited currencies and currency selected above. <input type="radio"/> This Delivery Mode is available in inherited currencies, the currency selected above and default currency, US Dollars. <input type="radio"/> This Delivery Mode is available in all the active currencies in the system. Note: Prices are only calculated for currencies that have exchange rates defined in the system.
Training Units	<input type="text"/>
Inherited Training Unit Cost	No Training Units defined at Course.

Registration Information	
Vendor	<input type="text"/> 
Customer Service Representative	NIH LearningAdmin 
Allow Drop Before Days	0

Availability Information	
Available From	02/26/2015 
Discontinued From	<input type="text"/> 
Display for Call Center	<input checked="" type="checkbox"/>
Display for Learner	<input checked="" type="checkbox"/>

Back

Finish

Back to Course

8. The new delivery type will appear on the Delivery Types tab.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main	Learning Assignments	Related Info	Policies	Delivery Types	Notifications	Ratings
------	----------------------	--------------	----------	----------------	---------------	---------

Delivery Types [Add Delivery Type](#) | [Print](#) | [Export](#)

Delivery Types	New Offering
----------------	--------------

Delivery Mode Details: [Instructor led](#) [New Instructor led Offering](#)

EDIT DELIVERY TYPE SETTINGS - OPTIONAL

1. Click the **Delivery Mode Details** link.

Course Details: NIH LMS Training Sample, #NIHLMS00001

Main	Learning Assignments	Related Info	Policies	Delivery Types	Notifications	Ratings
------	----------------------	--------------	----------	----------------	---------------	---------

Delivery Types [Add Delivery Type](#) | [Print](#) | [Export](#)

Delivery Types	New Offering
----------------	--------------

Delivery Mode Details: [Instructor led](#) [New Instructor led Offering](#)

MAIN TAB

1. Make the necessary changes then click the **Save button**.

Instructor led Delivery Mode Details: NIH LMS Training Sample,#NIHLMS00001,ILT

For more details on the OPM standard EHRI Values click [here](#).

Main Learning Assignments Related Info Expenses Policies

Delivery Mode Information

Title NIH LMS Training Sample
ID NIHLMS00001 ILT
Domain* NIH Common
Description
Character Limit:255
Course Description This course is designed to show Learning Administrators how to build and manage a catalog of courses in LMS.
Duration(HH:MM)* 16:00

Owner [Add Owner](#) | [Modify Table](#)

Name	Inherited From	Actions
NIH LearningAdmin	Course	Delete

Pricing Information

Base Price [Print](#) | [Export](#)

Currency	Price*
US Dollars	0.00

Price* [Add Price](#)

No items found

Training Units

Inherited Training Unit Cost No Training Units defined at Course.

Registration Information

Vendor
Customer Service Representative NIH LearningAdmin
Allow Drop Before Days 0

Availability Information

Available From 02/26/2015
Discontinued From
Display for Call Center
Display for Learner

[View All Offerings](#) [Create New Offering](#) [Save](#) [Back to Course](#)

LEARNING ASSIGNMENTS TAB

The Learning Assignments tab can be used to add the following to a delivery type:

- **Learning content**
 - Tasks – These are items that must be completed and checked off by the learning administrator, manager, or learner in order to successfully complete the course.
 - Content - This refers to online course content.
- **Resources** – Resources include rooms, people, equipment and inventory.
- **Evaluations** – These are questions learners answer after completing a course. The evaluations must be created in the LMS to be used.

NOTE: Any learning assignments or evaluations that were identified at the course level will become defaults at the delivery types level. They may be updated or deleted at any time.

Instructor led Delivery Mode Details: NIH LMS Training
Sample,#NIHLMS00001,ILT

Main
Learning Assignments
Related Info
Expenses
Policies

Learning Assignments
Add learning assignments that learner can use to complete this course. Learners must complete all required assignments.

Learning Content [Add Learning Assignments](#) | [Print](#) | [Export](#)

Up	Down	Type	Name	Details	Requirement	Actions
⬆	⬇	Training Content	DDM Seminar Series - April 2014	Attempts on Content Allowed: 3 Status: Enabled	Required	Edit Assignment Details

Resources
Add persons, rooms, inventories or equipments required for this delivery.

Resources [Add Resource](#)

No items found

Qualified Instructors [Add Qualified Instructor](#)

No items found

Evaluations
Add evaluations that the learner must complete after all learning assignments are completed.

Launch evaluation on completion

Evaluation [Add Evaluation](#) | [Print](#) | [Export](#)

Module	Status	Event	Actions
NIHTC Evaluation	Published	Only after the Learner has been marked Complete	Edit Delete

[Save](#)

LEARNING ASSIGNMENTS TAB – ADDING A ROOM RESOURCE

NOTE: Any changes made on this tab will be saved automatically.

Instructor-led courses should be assigned to a room. Making the room assignment at the delivery type level will assign the room to every offering that is created base on the delivery type. Room assignments can also be made at the offering level. This is useful if you have multiple rooms that could potentially be used for the course.

1. Click the **Add Resource** link.



Resources
Add persons, rooms, inventories or equipments required for this delivery.

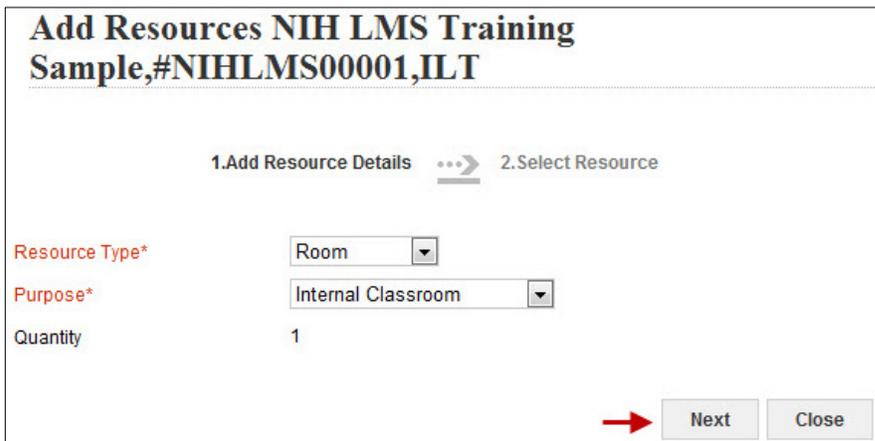
Resources → Add Resource

No items found

Qualified Instructors Add Qualified Instructor

No items found

2. Select “Room” as the **Resource Type**.
3. Select “Internal Classroom” as the **Purpose**.
4. Click the **Next** button.



Add Resources NIH LMS Training
Sample,#NIHLMS00001,ILT

1.Add Resource Details ➤ 2.Select Resource

Resource Type*

Purpose*

Quantity 1

→

5. Enter **search criteria** for the room being added.
6. Click the **Search button**.
7. Click the **checkbox** associated with the room being added.
8. Click the **Save button**.

Select Room : NIH LMS Training Sample,#NIHLMS00001,ILT

1.Add Resource Details [...](#) 2.Select Resource

Location*

Facility

Capacity*

Resource Name

Available Resources Only

Room [Print](#) | [Export](#) | [Modify Table](#)

Select	Name	Location	Facility	Max. Capacity	Rate
<input checked="" type="radio"/>	Classroom A	NIH Main Campus	Building 10	30	0.00 USD

9. The room will now be associated with the delivery type of this course.

Resources
Add persons, rooms, inventories or equipments required for this delivery.

Resources [Add Resource](#) | [Print](#) | [Export](#) | [Modify Table](#)

Description	Resource Type	Quantity	Assigned	Rate	Actions
Internal Classroom	Classroom	1	Classroom A	0.00 USD	Delete

Qualified Instructors [Add Qualified Instructor](#)

No items found

DELETING A ROOM RESOURCE

1. From the Learning Assignments tab, click the **Delete link** associated with the room being deleted.

Resources
Add persons, rooms, inventories or equipments required for this delivery.

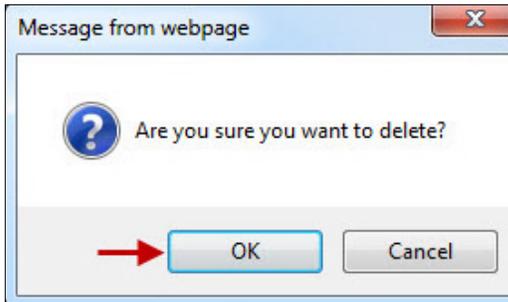
Resources [Add Resource](#) | [Print](#) | [Export](#) | [Modify Table](#)

Description	Resource Type	Quantity	Assigned	Rate	Actions
Internal Classroom	Classroom	1	Classroom A	0.00 USD	Delete

Qualified Instructors [Add Qualified Instructor](#)

No items found

2. Click **OK** in the confirmation popup window.



3. The room will no longer be associated with the delivery type.

RELATED INFO TAB

Learning Administrators can add specific items to a delivery type that will be available in addition to items added at the course level and in some cases overwrite the settings at the course level.

- [Attachments](#) – Attachments added here will be specific to this delivery type and be available along with course level attachments.
- [Prerequisites](#) – Prerequisites added here will be in addition to any set at the course level.
- [Continuing Education Credits](#) – Adjusting the credits or field of study will overwrite the course defined settings. Additional fields of study may be added.

Instructor led Delivery Mode Details: NIH LMS Training Sample,#NIHLMS00001,ILT

Main	Learning Assignments	Related Info	Expenses	Policies	
-------------	-----------------------------	---------------------	-----------------	-----------------	--

Attachments [Add Attachment](#)
No items found

Notes [Add Notes](#)
No items found

Catalog Prerequisites [Add Prerequisites](#) | [Print](#) | [Export](#) | [Modify Table](#)

Title	Type	Version	ID	Required/Recommended	Actions
NIH LMS Entering The CAN On An Order	Course	FY13	NIHTC1009	Required	Delete

Continuing Education Credits [Add Field of Study](#) | [Print](#) | [Export](#) | [Modify Table](#)

Field of Study	Description	Default Credits	Actions
Total Credits:			0

Certificate Templates [Add Certificate Template](#)
No items found

Provider Information [Print](#) | [Export](#)

User Name	Date
Created by	
Updated by	

Checklists [Add Check List](#)
No items found

To make changes, follow the directions as describe in the Managing Courses section of this manual.

[Adding Attachments](#)

[Adding A Course Prerequisite](#)

[Adding Continuing Education Credits To A Course](#)

NOTE: All changes on this tab are automatically saved.

POLICIES TAB

Learning Administrators can adjust various policies specific to the delivery type on the Policies tab. These policies will carry over to every offering created based on the delivery type.

NOTE: All changes made on this tab will be lost unless the Save button is clicked after making the changes.

Instructor led Delivery Mode Details: NIH LMS Training Sample,#NIHLMS00001,ILT

Main Learning Assignments Related Info Expenses Policies

Enrollments

Min Count
Max Count
Waitlist Max

Open Enrollments for All

Allow any Audience Type into any seat day(s) before event starts

Close Enrollments

Stop allowing new enrollments day(s) before event starts

Domain Level Drop Policies for Internal Orders

No items found

Domain Level Drop Policies for External Orders

No items found

Drop Policy [Add Drop Policy](#)

No items found

Price Lists US Dollars [Add Price List](#) | [Print](#) | [Export](#) | [Modify Table](#)

Price List	Aud Type	Price	Actions
Master Price List	Global	0.00(Inherited From Course)	

Audience Type / Audience Sub Type [Add Seats](#) | [Add Audience Type](#)

Audience Type / Audience Sub Type	Percentage Seats Reserved	Expiration Date	Action
NIH Sample Audience Type	100		Remove

Manager Approval Required to Register

Do not Override Course Settings (Currently No, Manager Approval Not Required)
 Manager Approval Required to Register
 Manager Approval and Designated Additional Approval Required to Register
 Manager Approval Not Required to Register

Cancellation of pending approval before days:

Completion Policy

Do you want to override Completion Policy set at Course level.(Currently:Manager can mark complete)

Learner can mark complete
 Manager can mark complete

If for any reason the offering is not completed

Change completion status automatically after specified number of days to the specified status, if the offering has not been manually marked complete.

Days:
Status: Select One

(Days are counted after scheduled end date OR after order date for self-paced offerings. 0 means completion is never marked automatically.)

[Save](#)

Enrollments: To change the Minimum Count, Maximum Count, and Waitlist Count, enter the new values into their respective fields.

Open Enrollments for All: The number entered in this field represents the number of days the start of an offering that a course audience type will lose its effect. All offerings based on this delivery type will become open for registration to all learners X number of days before the offering starts.

Close Enrollments: The number entered in this field represents the number of days before the offering starts that registrations will no longer be accepted by learners.

Manager Approval Required to Register: Select a radio button to change the course policy.

Completion Policy: Select the appropriate checkboxes to change the course completion policy.

DELIVERY TYPES – ADDING A DROP POLICY

Learning Administrators can add a drop policy to a delivery type. All offerings that are created based on this delivery type will inherit the drop policy as a default.

Follow the steps below to create a drop policy for a delivery type.

1. From the Policies tab, click the **Add Drop Policy link**.

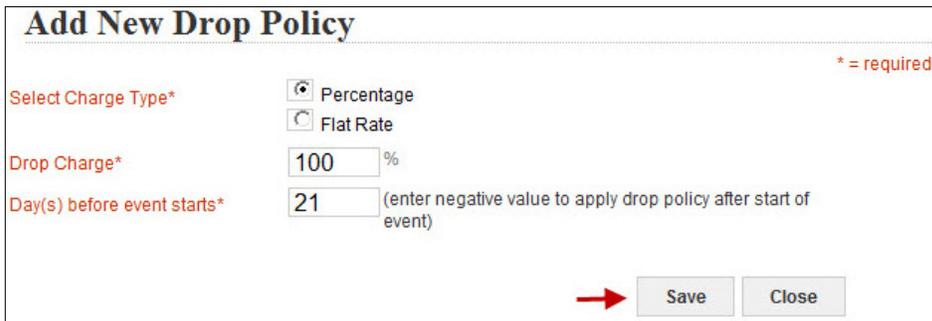


Drop Policy [Add Drop Policy](#)

No items found

2. Enter the percent to be charged if a learner drops the offering and the number of days before the offering start date this policy will be effective.

3. Click the **Save button**.



Add New Drop Policy * = required

Select Charge Type* Percentage Flat Rate

Drop Charge* %

Day(s) before event starts* (enter negative value to apply drop policy after start of event)

[Save](#) [Close](#)

NOTE: Selecting the Flat Rate option requires a price to be entered: (Shown below)



Add New Drop Policy * = required

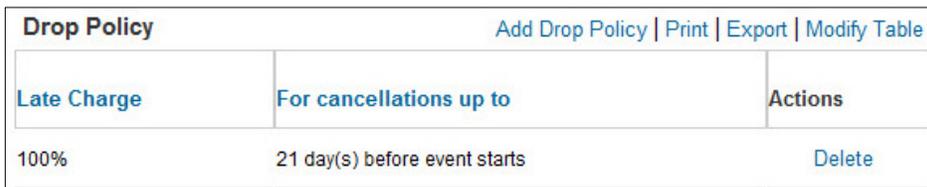
Select Charge Type* Percentage Flat Rate

Drop Charge* * US Dollars

Day(s) before event starts* (enter negative value to apply drop policy after start of event)

[Save](#) [Close](#)

4. The policy will now be added to the delivery type.



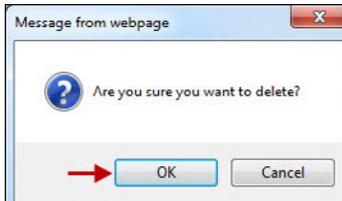
Drop Policy Add Drop Policy Print Export Modify Table		
Late Charge	For cancellations up to	Actions
100%	21 day(s) before event starts	Delete

DELETE A DROP POLICY

1. From the policies tab, click the **Delete link** associated with the drop policy.

Drop Policy			Add Drop Policy Print Export Modify Table
Late Charge	For cancellations up to	Actions	
100%	21 day(s) before event starts	 Delete	

2. Click the **OK button**.



3. The drop policy will no longer apply to the delivery type.

ADD AN AUDIENCE SUB-TYPE TO A DELIVERY TYPE

Learning Administrators can add an audience sub-type to a delivery type. Adding an audience sub-type at this level restricts all offerings created based on this delivery type to the population in the audience sub-type. Follow the instructions below to add an audience sub-type to a delivery type.

1. Click the **Add Audience Type link**.

Audience Type / Audience Sub Type	Add Seats Add Audience Type
No items found	

2. Select **Audience SubType** from the Audience Type/Sub Type drop-down menu.
3. Enter the **name** of the audience sub type.
4. Click the **Search button**.
5. Click the **checkbox** associated with the audience sub type.
6. Click the **Select button**.

Select Audience Type / Audience Sub Type

Name Audience Type/SubType

Show System Generated

Select Audience Sub Type [New Audience Sub Type](#) | [Print](#) | [Export](#)

Showing 1 out of 1 results

<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	NIH Sample Audience Type

7. Click the OK button in the confirmation window.

Message from webpage

The selected audience types are associated with the delivery mode. Do you also want to associate them with offerings of this delivery mode?

8. The Audience Sub Type will now be added to the delivery type.

Audience Type / Audience Sub Type		Add Seats Add Audience Type	
Audience Type / Audience Sub Type	Percentage Seats Reserved	Expiration Date	Action
NIH Sample Audience Type			Remove

NOTE: You can add additional audience sub types by repeating these steps.

NOTE: All offerings created from this delivery type will be restricted to the audience sub-type populations that have been added.

ADDING SEATS TO AN AUDIENCE SUB TYPE

A percentage of seats can be reserved for specific audience sub types that will be reflected in the offerings created. Follow the instructions below to reserve seats in the audience sub type.

1. Click the **Add Seats** link.

Audience Type / Audience Sub Type		Add Seats Add Audience Type	
Audience Type / Audience Sub Type	Percentage Seats Reserved	Expiration Date	Action
NIH Sample Audience Type			Remove

2. Select the **audience Sub Type** from the Audience Type or Audience Sub Type

drop-down menu.

3. Enter a **number for the percentage** of seats that will be allocated per offering to the audience sub type.
4. Click the **Add button** then click the **Done button**.

Seats per Audience Type or Sub Type

Add seats for each audience type or subtype.

Audience Type or Audience Sub Type:

Percentage Seats Reserved:

Audience Type or Audience Sub Type [Print](#) | [Export](#) | [Modify Table](#)

Audience Type or Audience Sub Type	Percentage Seats Reserved	Actions
NIH Sample Audience Type	100	Get Detail Delete

5. The percentage of seats reserved will now be displayed along with the audience sub type.

Audience Type / Audience Sub Type		Add Seats Add Audience Type	
Audience Type / Audience Sub Type	Percentage Seats Reserved	Expiration Date	Action
NIH Sample Audience Type	100		Remove

EDITING THE NUMBER OF RESERVED SEATS

1. Click the **Add Seats link**.

Audience Type / Audience Sub Type		Add Seats Add Audience Type	
Audience Type / Audience Sub Type	Percentage Seats Reserved	Expiration Date	Action
NIH Sample Audience Type	100		Remove

2. Click the **Get Detail** link in the Actions column.

Seats per Audience Type or Sub Type

Add seats for each audience type or subtype.

Audience Type or Audience Sub Type:

Percentage Seats Reserved:

Audience Type or Audience Sub Type [Print](#) | [Export](#) | [Modify Table](#)

Audience Type or Audience Sub Type	Percentage Seats Reserved	Actions
NIH Sample Audience Type	100	Get Detail Delete

3. Enter a new value for the Percentage Seats Reserved field.

4. Click the Update button.

5. Click the Done button.

Seats per Audience Type or Sub Type

Edit seats for each audience type or subtype.

Seats per Audience Type or Sub Type:

Percentage Seats Reserved:

Audience Type or Audience Sub Type [Print](#) | [Export](#) | [Modify Table](#)

Audience Type or Audience Sub Type	Percentage Seats Reserved	Actions
NIH Sample Audience Type	100	Get Detail Delete

6. The reserved number of seats will now be updated.

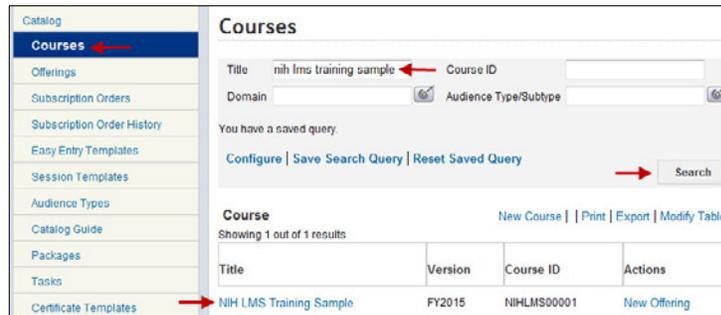
Audience Type / Audience Sub Type		Add Seats Add Audience Type	
Audience Type / Audience Sub Type	Percentage Seats Reserved	Expiration Date	Action
NIH Sample Audience Type	75		Remove

LOCATING A COURSE AFTER IT IS CREATED

1. Click the **Admin Icon**.



2. Select **Courses** in the left navigation menu. (Default)
3. Enter search criteria for the course then click the **Search button**.



4. Click the course **Title link** to view and edit the course details.

CREATING A NEW COURSE VERSION – OPTIONAL

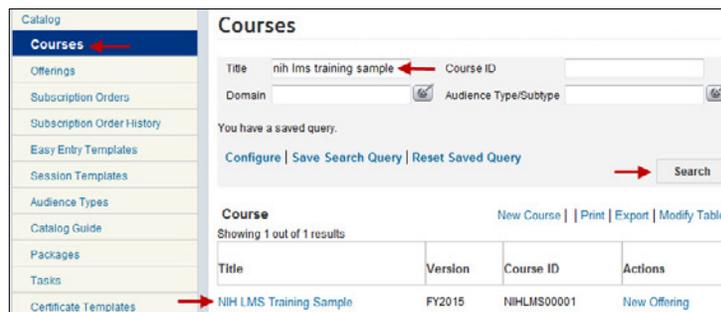
Learning Administrators have the ability to create multiple versions of the course. This is useful for courses that may have pricing or content changes periodically. Creating a new version keeps a record of the course's previous settings, attachments, content, price, etc. If a course is update without creating a new version, there will be no record in the LMS of the previous settings.

Follow the instructions below to create a new version of a course.

1. Click the **Admin Icon**.



2. Select **Courses** in the left navigation menu. (Default)
3. Enter search criteria for the course then click the **Search button**.



4. Click the course **Title link** to view and edit the course details.
5. Scroll to the bottom of the screen and click **Create New Version**.

6. Enter the new version number and the date from which the course will be available. (Both are required to save a new version.)
7. Select any other options you would like to take effect when the new version is created.
8. Click the **Done** button.

New Version: NIH LMS Training Sample

Version Number*

New Version Available From* 

Copy all course equivalents from the old version of the course to the new version.

Add the new version of course to all packages which already had the old version.

Discontinue old version and replace with new version in curricula, goal items, equivalents, prerequisites, people configurations and prescriptive rules.

If a user completed this course as an equivalent to a course in a certification, force recertification by 

Disallow new enrollments for all active offerings of the old version of the course.

On My Success Plan

For individuals assigned the old version of the course (where the status is New), replace the old version of the course with the new version.

Associated Certifications

Do not replace the old version of the course with the new version.

Replace course, do not version certifications. Select associated certifications where old version of course should be replaced with new version. Select certifications in the next step.

Create new versions of certifications with versioned course. Replace old version of course with new version and manually create new versions of associated certifications. Note: This will launch a wizard to create certifications.

NOTE: The old version of the course will still be active until the new version becomes available.

MANAGING OFFERINGS

OFFERINGS

Offerings, which are also known as classes or learning events, are individual instances of Delivery Types. Just as Delivery Types inherit details from the parent course, offerings inherit details from the parent delivery type.

There are four places from which you can create a new offering:

- The **Delivery Type tab** of a specific course
- The **New Offering link** on the Offerings search screen.
- The **Course Search Results table** after searching for a course.
- The **Main Tab** of an offering.

The following instructions will guide you through creating an offering from the Offerings search screen.

CREATE AN OFFERING

1. Select the **Admin Icon**.



2. Select **Offerings** in the left navigation menu.

3. Click the **New Offering link**.

4. Click the **Based on Course pick icon**.

New Offering

1. Select Offering Type ...> 2. Define Offering

Create New Offering

Based on Course*  

Delivery Type*

5. Enter search criteria for a course then click the **Search** button.
6. Click the **checkbox** associated with the course in the results table.

Select Course

Title  Course ID

Domain  Audience Type/Subtype 

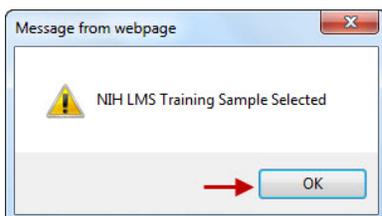
[Configure](#) | [Save Search Query](#) 

Courses [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

Select	Version	Course ID	Title
<input type="checkbox"/> 	FY2015	NIHLMS00001	NIH LMS Training Sample

7. Click **OK** in the confirmation popup window.



8. Select a delivery type from the **Delivery Type** drop-down menu.
9. Click the **Next** button.

10. The Offering Details screen will be displayed.

EDIT OFFERING DETAILS - REQUIRED

1. In the Domain field, verify that the correct domain is specified and that it is the same domain that is also specified for the Course and Delivery Type. If not, change it so that it matches the domain of the other levels.
2. A description for this offering may be entered. This description will be in addition to the description displayed from the course level.

3. Enter the **start date** of the offering.
4. Enter a **session template**. This will automatically calculate the end date.
5. Enter the **duration**. This will default to the duration of the delivery type but can be changed if needed.
6. Enter the **location and facility**.
7. Enter the appropriate **language**.

Scheduling Details	
Start Date*	03/26/2015
	<input type="checkbox"/> Stop promotion from waitlist on offering start date
End Date	
Session Template*	NIH Thu- Fri 8:30-4:30
Duration(HH.MM)*	16:00
Location*	Sample Location
Facility	Sample Facility
Language*	English

8. The Offering Price and Training Units can be adjusted in the Pricing Information section if needed.

Pricing Information	
Base Price	0.00 (Inherited from Course)
Currency	US Dollars
Offering Price*	<input type="text"/>
Multi-Currency Pricing	<input checked="" type="radio"/> This Offering is available only in inherited currencies and currency selected above. <input type="radio"/> This Offering is available in inherited currencies, the currency selected above and default currency, US Dollars. <input type="radio"/> This Offering is available in all the active currencies in the system. Note: Prices are only calculated for currencies that have exchange rates defined in the system.
Training Units	<input type="text"/>

9. Make any needed changes in the **Registration Information** section.

10. The **Min Count**, **Max Count**, and **Max in Waitlist** will default based on the delivery type settings. These may be changed if needed.

Registration Information	
Min Count*	<input type="text" value="5"/>
Max Count*	<input type="text" value="25"/>
Max In Wait List*	<input type="text" value="10"/>
Student Count	
Students Waitlisted	
Overbook Count	0
Vendor	<input type="text"/>
Customer Service Representative	NIH LearningAdmin
Allow Drop	<input checked="" type="radio"/> Yes, this offering can be dropped anytime after registration <input type="radio"/> No, this offering cannot be dropped on and after date <input type="text"/> 0 days from start date

11. Make any necessary changes in the **Availability Information** section then click the **Finish** button.

Availability Information	
Display for Call Center	<input checked="" type="checkbox"/>
Display for Learner	<input checked="" type="checkbox"/>
Test	<input type="checkbox"/>
Stop Auto-Promotion Date	<input type="text"/> 
Open Enrollment Date	<input type="text"/> 
Open Enrollment For All Audience Types Date	<input type="text"/> 
Enrollment Closes Before	<input type="text"/> 
Offering Reminder before Start Date (days)	<input type="text" value="3"/>
Offering Completion Reminder after End Date (days)	<input type="text" value="3"/>
 <input type="button" value="Finish"/> <input type="button" value="Cancel"/>	

- **Display for Call Center** – Checking or unchecking does not change any functionality in the LMS. Leave as is.
- **Display for Learner** – When checked, the offering is visible to learners in the LMS Catalog.
- **Test** – When checked, the test attached to the course becomes available to learners taking this offering.
- **Stop Auto-Promotion Date** – The date entered here is the date learners no longer move from the waitlist to the roster even if space becomes available.
- **Open Enrollment Date** – The date entered here is the date the offering becomes visible in the LMS catalog for all learners to register.
- **Open Enrollment For All Audience Types Date** – The date entered here is the date all learners will be able to register even if an audience type is assigned to the offering.
- **Enrollment Closes before** – The date entered here is the date that learners can no longer register even if space is available.
- **Offering Reminder Before Start Date (days)** – The number entered here represents the number of days before the start date of the offering that a reminder notification will be sent to registered learners.
- **Offering Completion Reminder after End Date (days)** – The number entered here represents the number of days after the offering end date that a reminder notification will be sent to the owner of the offering.

USING OFFERING DEEPLINKS

Once the offering is saved, deep links will be available for use on the main page. Below is a description of what they are used for.

Instructor led Offering Details: NIH LMS Training Sample,# NIHILMS00001,#00085133

Main	Learning Assignments	Expenses	Related Info	Policies	Notifications	Ratings	
------	----------------------	----------	--------------	----------	---------------	---------	--

Offering Details

Title: NIH LMS Training Sample
Course ID: NIHILMS00001
ID: 00085133
Description:
Character Limit:1000
Domain*: NIH Common [Edit](#)
Course Description: This course is designed to show Learning Administrators how to build and manage a catalog of courses in LMS.
Delivery Mode Description:
Course Deeplink URL: <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/GuestCourseDetailURL?otId=cours000000000449536&callerPage=/learning/offeringTemplateDetails.xml>
Course Deeplink URL for Private View: <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/GuestCourseDetailURL?otId=cours000000000449536&callerPage=/learning/offeringTemplateDetails.xml&privateView=true>
Offering Deeplink URL: <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/GuestOfferingDetails?offeringId=class00000000074022&isFromDeeplink=true>
Offering Deeplink URL for Private View: <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/GuestOfferingDetails?offeringId=class00000000074022&isFromDeeplink=true&privateView=true>
Registration Deeplink URL: <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/RegisterCatalog?offeringId=class00000000074022&oneClickLearningON=true>
Registration Deeplink URL for Private View: <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/RegisterCatalog?offeringId=class00000000074022&oneClickLearningON=true&privateView=true>

Owner: [Add Owner](#) | [Modify Table](#)

Name	Inherited From	Actions
NIH LearningAdmin	Course	Delete

- **Course Deeplink URL** – This link directs a learner to the course where all course details can be viewed and registrations for any available offerings may be performed.
- **Offering Deeplink URL** – This link directs a learner to the offering where all offering details can be viewed and registration for the offering may be performed.
- **Registration Deeplink URL** – This link registers learners for the offering.

NOTE: The Private view links allow learners to view even when the Display For Learner checkbox is unchecked.

OFFERINGS – LEARNING ASSIGNMENTS TAB

Learning Administrators may change any of the previous settings that have defaulted from the course and delivery type levels. All changes affect the offering only.

ILT Offering Details: NIH LMS Training Sample,# NIH LMS00001,#00085133

Main	Learning Assignments	Expenses	Related Info	Policies	Notifications	Ratings
------	-----------------------------	----------	--------------	----------	---------------	---------

Learning Assignments And Evaluation
 Add learning assignments and evaluation that learners can use to complete this offering. Learners must complete all the required assignments and the number of optional tasks specified below. You can also suggest the sequence in which the learning assignments need to be completed.

Any changes made to learning assignments and evaluation is not made available to learner's registrations and/or completed courses automatically. To make them available, you must save and publish these changes. [Save and Publish](#)

Optional Tasks to Complete

Pre Class Assessment [Add Preclass Assessment](#) | [Change Status](#)

No items found

Learning Content [Add Learning Assignments](#) | [Change Status](#) | [Print](#) | [Export](#)

Up	Down	Type	Module Name	Details	Requirement	Actions
⬆	⬇	Session	Sessions	Status: Enabled	Required	Actions

Post Class Assessment [Add Postclass Assessment](#) | [Change Status](#)

No items found

Note: Override Offering Completion Policy from Policies Tab as Auto-completion, so as pre and post assessment can be enforced to learner.

Launch evaluation on completion

Evaluation [Add Evaluation](#) | [Print](#) | [Export](#)

Module	Status	Event	Actions
NIHTC Evaluation	Published	Only after the Learner has been marked Complete	View Result Edit Delete

Learning Assignment Sequencing

Suggested - learner need not complete previous assignment before attempting the next assignment in the sequence.

Enforced - learner must complete (successfully or unsuccessfully) the previous assignment before attempting the next assignment in the sequence.

Enforced with successful completion - learner must complete the previous assignment successfully before attempting the next assignment in the sequence.

Resources
 Add persons, rooms, inventories or equipments required for this offering.

Resources [Add Resource](#) | [Print](#) | [Export](#) | [Modify Table](#)

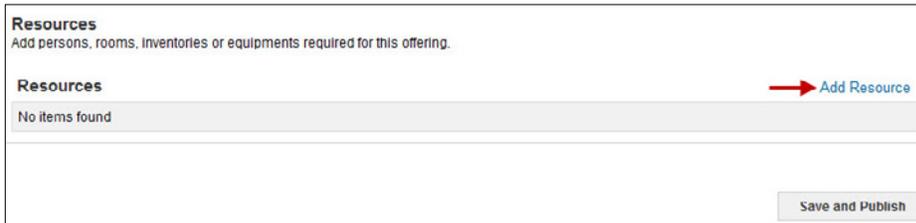
Purpose	Resource Type	Quantity	Resource ID	Resource Name	Qualification Level	Rate	Actions
Internal Classroom	Room	1	00007542	Classroom A		0.00 USD	View/Edit Delete View Calendar

[Save and Publish](#)

ADDING A ROOM RESOURCE - RECOMMENDED

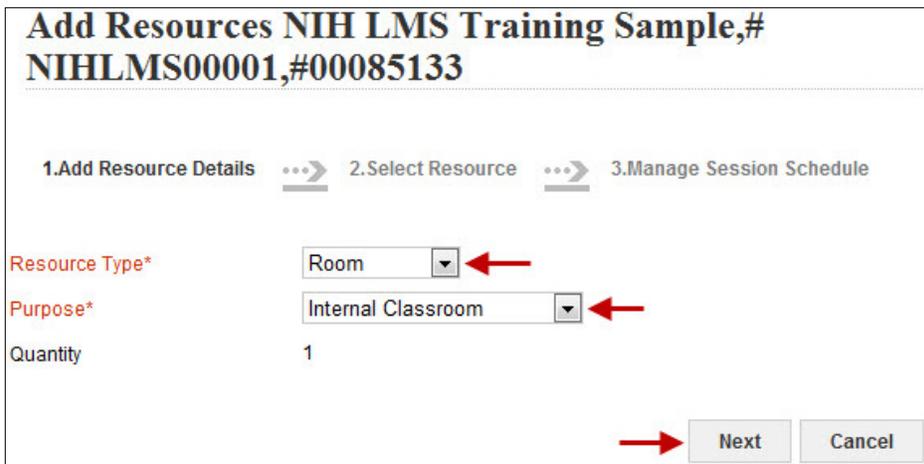
Adding a room to instructor-led offerings is important so that learners know which room the offering is being held in. The room is displayed in the email notification sent at the time of registration. Follow the instructions below to add a room to the offering.

1. Click the **Add Resource** link.



The screenshot shows a web interface titled "Resources" with the subtitle "Add persons, rooms, inventories or equipments required for this offering." Below the subtitle, there is a search bar containing the text "No items found". To the right of the search bar is a blue link labeled "Add Resource" with a red arrow pointing to it. At the bottom right of the page is a "Save and Publish" button.

2. Select **Room** from the Resource Type drop-down menu.
3. Select **Internal Classroom** from the Purpose drop down menu.
4. Click the **Next** button.



The screenshot shows a form titled "Add Resources NIH LMS Training Sample, #NIHLMS00001, #00085133". At the top, there are three steps: "1. Add Resource Details", "2. Select Resource", and "3. Manage Session Schedule", with arrows indicating the current step is 1. Below the steps, there are three fields: "Resource Type*" with a dropdown menu set to "Room", "Purpose*" with a dropdown menu set to "Internal Classroom", and "Quantity" with the value "1". Red arrows point to the "Room" dropdown, the "Internal Classroom" dropdown, and the "Next" button. The "Next" and "Cancel" buttons are located at the bottom right of the form.

5. Enter search criteria for the room then click the **Search** button.
6. Select the **radio button** associated with the room being selected.
7. Click the **Next** button.

Select Room : NIH LMS Training Sample,# NIHLMS00001,#00085133

1.Add Resource Details >>> 2.Select Resource >>> 3.Manage Session Schedule

Location* 

Facility 

Offering Start Date 04/02/2015

Offering End Date 04/03/2015

Capacity*

Resource Name

Show Available Resources Only

Currency 



Room [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

Select	Name	Location	Facility	Max. Capacity	Rate	Actions
<input checked="" type="checkbox"/> 	Sample Classroom	Sample Location	Sample Facility	30	0.00 USD	



8. On the Add Resources screen, click the **Done** button.

Add Resources

1.Add Resource Details >>> 2.Select Resource >>> 3.Manage Session Schedule

Select the sessions for which this resource must be scheduled.

Sessions [View Resource Calendar](#)

<input type="checkbox"/>	Sessions	Start Date	Day	Start Time	End Time
<input checked="" type="checkbox"/>	1	04/02/2015	Thursday	08:30 a.m.	04:30 p.m.
<input checked="" type="checkbox"/>	2	04/03/2015	Friday	08:30 a.m.	04:30 p.m.

Ignore Scheduling Conflicts



9. The offering will now be assigned to the room.

Resources
Add persons, rooms, inventories or equipments required for this offering.

[Add Resource](#) | [Print](#) | [Export](#) | [Modify Table](#)

Purpose	Resource Type	Quantity	Resource ID	Resource Name	Qualification Level	Rate	Actions
Internal Classroom	Room	1	00007540	Sample Classroom		0.00 USD	View/Edit Delete View Calendar

- Change a room by clicking the **View/Edit link** in the Actions column.
- Delete a room by clicking the **Delete link** in the Actions column.
- View the room calendar by clicking the **View Calendar link** in the Actions column.

RELATED INFO TAB

The related information that is inherited from the course and delivery type levels may be changed as described in earlier sections of this manual. These changes will only affect this specific offering. **Changes made on this tab are automatically saved.**

ILT Offering Details: NIH LMS Training Sample,# NIH LMS00001

Main	Learning Assignments	Expenses	Related Info	Policies	Notifications	Ratings
Administrative Tasks Add Task						
No items found						
Attachments Add Attachment						
No items found						
Notes Add Note						
No items found						
Delivery Type Attachments						
No items found						
Course Attachments Print Export						
Attachment Name	Type	Category	Locale	Private		
Course Website	URL	Website	English	No		
Catalog Prerequisites Add Prerequisites Print Export Modify Table						
Title	Type	Version	ID	Required/Recommended	Actions	
NIH LMS Entering The CAN On An Order	Course	FY13	NIHTC1009	Required	Delete	
Continuing Education Credits Add Field of Study Print Export Modify Table						
Field of Study	Description	Default Credits	Actions			
Total Credits:				0		
Learning Recommendations Add Recommendations						
No items found						
Note: If recommendations are not added to the offering, recommendations on course will be made available to the learners.						
Certificate Templates Add Certificate Templates						
No items found						
Provider Information Print Export						
	User Name	Date				
Created by	nihlearningadmin	03/30/2015				
Updated by	nihlearningadmin	03/30/2015				

Add Attachments: See page 84

Add Prerequisite: See page90

Add Field of Study: See page96

Add Learning Recommendation: See page100

POLICIES TAB

The policies that are inherited from the course and delivery type levels may be changed as described in earlier sections of this manual. These changes will only affect this specific offering. **After making changes, the Save button must be clicked to make the changes permanent.**

ILT Offering Details: NIH LMS Training Sample,# NIH LMS00001,#00085133

Main	Learning Assignments	Expenses	Related Info	Policies	Notifications	Ratings
------	----------------------	----------	--------------	-----------------	---------------	---------

Domain Level Drop Policies for Internal Orders
No items found

Domain Level Drop Policies for External Orders
No items found

Delivery Mode Level Drop Policies
No items found

Drop Policy [Add Drop Policy](#)
No items found

Price List US Dollars ▾ [Add Price List](#) | [Print](#) | [Export](#) | [Modify Table](#)

Price List	Aud Type	Price	Actions
Master Price List	Global	0.00	Delete

Audience Type / Audience Sub Type [Add Audience Type](#)

Audience Type / Audience Sub Type	Min Seats	Expiration Date	Actions
NIH Sample Audience Type	25		Remove Add Seats Remove Seats

Manager Approval Required to Register

Do not Override Delivery Type Settings (Currently:No, Manager Approval Not Required)
 Manager Approval Required to Register
 Manager Approval and Designated Additional Approval Required to Register
 Manager Approval Not Required to Register

Cancellation of pending approval before days

Recurring Registration

Do not Override Domain setting (Currently set to: Do not allow recurring registration if existing registration is In-Progress or successfully completed)
 Allow recurring registrations
 Do not allow recurring registration if current registration is

Completion Policy

Use Domain level completion policy Override Domain level completion policy.

Auto-completion or manual completion.
Domain level policy :Offering is marked complete automatically when all learning assignments are marked complete. (Currently:Manager can mark complete)

ADD A DROP POLICY

Follow the instructions in the Delivery Types section to [add a drop policy](#) to the offering.

ADD AUDIENCE TYPE SEATS

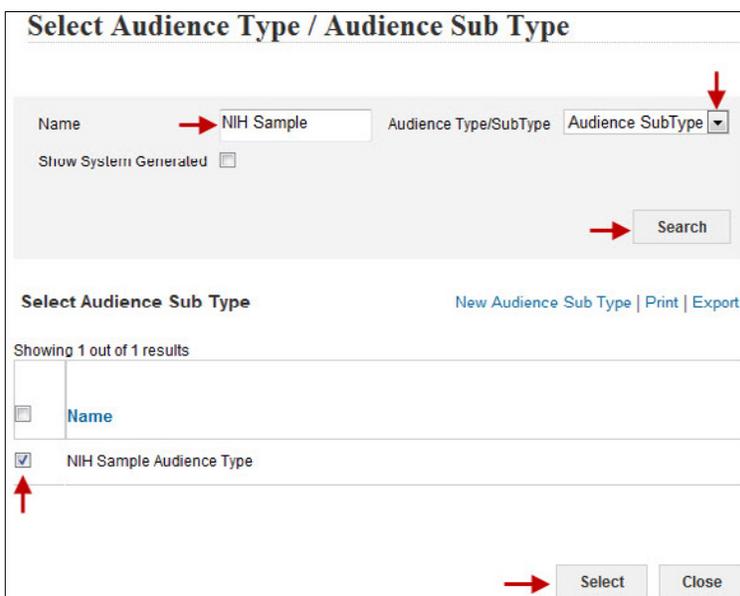
The LMS allows Learning Administrators to identify specific groups of people to have access to an offering through the use of Audience sub-types. Any audience sub-type that is added at the offering level will apply just to that offering. If the intent is to have every offering restricted to a specific audience, the audience sub-type must be applied to the delivery type (See page 118). If the course has multiple deliver types, then the audience must be applied at the course level to ensure that all offerings are restricted. To add an audience sub-type to a specific offering, follow the instructions below.

NOTE: By default, all learners can view and register for all offering in the LMS unless they are restricted by an audience sub-type.

1. Click the **Add Audience Type** link.



2. Select **Audience Sub Type** from the Audience Type/Sub Type drop-down menu.
3. Enter the name of the audience sub type then click the **Search** button.
4. Click the **checkbox** associated with the audience sub type.
5. Click the **Select** button.



The offering will now be restricted to the population of the audience sub type.

Audience Type / Audience Sub Type			Add Audience Type
Audience Type / Audience Sub Type	Min Seats	Expiration Date	Actions
NIH Sample Audience Type			Remove Add Seats

SPECIFY RESERVED SEATS FOR AN AUDIENCE SUB TYPE

Learning Administrators can reserve a specific number of seats for an audience sub type in any offering. Follow the directions below to reserve seats.

1. Click the **Add Seats** link in the Actions column.

Audience Type / Audience Sub Type			Add Audience Type
Audience Type / Audience Sub Type	Min Seats	Expiration Date	Actions
NIH Sample Audience Type			Remove Add Seats

2. Enter a value in the **Min Seats** field then click the **Update** button.

NOTE: The value entered cannot exceed the number of seats available in the offering.

Seats within Audience Type or Audience Sub Type : NIH Sample Audience Type

Specify seats for audience type : NIH Sample Audience Type

Min Seats

Specify seats for audience sub type of NIH Sample Audience Type

Min Seats

Select Audience Type or Audience Sub Type

No Items Found

3. The number of reserved seats for the audience sub type will now be displayed.

Audience Type / Audience Sub Type			Add Audience Type
Audience Type / Audience Sub Type	Min Seats	Expiration Date	Actions
NIH Sample Audience Type	10		Remove Add Seats Remove Seats

These seats will be reserved for the population in the audience sub type. All other remaining seats will be available to learners that are not in the audience sub type.

LOCATING AN OFFERING AFTER IT IS CREATED

1. Click the **Admin Icon**.



2. Select **Offerings** in the left navigation menu.
3. Enter search criteria for the offering then click the **Search button**.
4. When the offering is found, click the **Title** to access the offering details.

Title	Version	ID	Course ID	Delivery	Language	Start Date	End Date	Actions
NIH LMS Training Sample	FY2015	00085133	NIH.MS00001	Instructor led	English	04/02/2015	04/03/2015	

NOTE: Offerings cannot be found by learners using the simple search on the day that they are created. Using the advanced search or category search method is the best way to for learners to locate the offering on the day that it is created.

MANAGING ROSTERS

VIEW AN OFFERING ROSTER

1. Click the **Admin Icon**.



2. Select **Offerings** in the left menu.
3. Enter **search criteria** for the offering then click the **Search button**.
4. Click the **Title** of the offering.

Offerings

Offering Type: Public Offerings Private Offerings

Title: NIH LMS Training Sample ID: []

Domain: [] Audience Type/Subtype: []

Start Date >=: [] End Date <=: []

Course ID: [] Language: []

Delivery: -Select One-

Configure | Save Search Query Search

Offerings New Offering | Print | Export | Modify Table

Showing 1 out of 1 results

Title	Version	ID	Course ID	Delivery	Language	Start Date	End Date	Actions
NIH LMS Training Sample	FY2015	00085133	NIHLMS00001	Instructor led	English	04/02/2015	04/03/2015	

5. Scroll to the bottom of the screen and click the **Roster** button.

Instructor led Offering Details: NIH LMS Training Sample,# NIH LMS00001,#00085133

Main Learning Assignments Expenses Related Info Policies Notifications Ratings

Offering Details

Title NIH LMS Training Sample
 Course ID NIH LMS00001
 ID 00085133
 Description
 Character Limit 1000
 Domain* NIH Common [Edit](#)
 Course Description This course is designed to show Learning Administrators how to build and manage a catalog of courses in LMS.
 Delivery Mode Description

Course Deeplink URL <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/GuestCourseDetailURL?offd=cours000000000449536&callerPage=/learning/offeringTemplateDetails.xml>
 Course Deeplink URL for Private View <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/GuestCourseDetailURL?offd=cours000000000449536&callerPage=/learning/offeringTemplateDetails.xml&privateView=true>
 Offering Deeplink URL <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/GuestOfferingDetails?offeringId=class00000000074022&isFromDeeplink=true>
 Offering Deeplink URL for Private View <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/GuestOfferingDetails?offeringId=class00000000074022&isFromDeeplink=true&privateView=true>
 Registration Deeplink URL <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/RegisterCatalog?offeringId=class00000000074022&oneClickLearningON=true>
 Registration Deeplink URL for Private View <https://test.learning.hhs.gov/Saba/Web/Cloud/goto/RegisterCatalog?offeringId=class00000000074022&oneClickLearningON=true&privateView=true>

Owner [Add Owner](#) | [Modify Table](#)

Name	Inherited From	Actions
NIH LearningAdmin	Course	Delete

Copy Create New Offering Send Notification **Roster** Save Cancel

View Broadcast Offerings New Broadcast Offering

ADD A LEARNER TO A ROSTER

1. While [viewing the Roster tab](#), click the **Add Learner** link.

Learning Details: NIH LMS Training Sample

Offering Information

ID	00085133
Instructor	
Delivery Type	Instructor led
Offering Type	Public
Language	English
Location	Sample Location
Sessions	NIH Thu- Fri 8:30-4:30
Start Date	04/02/2015
End Date	04/03/2015
Status	Open - Normal

Offering Details **Roster** **Attendance** **Results**

Roster Information

Roster	0 of 25 seats are full. (0 Overbooked, 0 Pending Approval registration(s) could be available for manager-approved registration(s).)
Waitlisted	0 of 10 seats are waitlisted. (0 Pending Approval registration(s) could be available for manager-approved registration(s).)
On Demand Notification	Send

View by Registration Status

Learners [→ Add Learner](#)

No Learners have been registered for this Offering

2. Enter search criteria for a learner then click the **Search** button.
3. Click the **checkbox** associated with the learner.
4. Click the **Select** button.

Select People

Select Input Type

Upload a CSV File

Search for available learners

Billed To

Order Contact

Order Contact's Organization

Contact Name*

Population: First Name:

Last Name: Person ID:

Username: Manager:

Organization: Location:

Domain: Person Type:

Learners

Showing 2 out of 2 results

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	NIH	Learner	NIHLEARNER	Other	00165395	HNAM6		NIHMANAGER

5. Click the **Close button** on the Registration Confirmation screen.

Registration Confirmation

Thank you, your request has been processed. Please check your email or Current Learning for training status updates

[Printer Friendly Version](#)

Order Contact: NIH LearningAdmin

Billed To: HNAM6

Order Status: Confirmed

Order Number: 02491463

Order Items

Title	Learners	Delivery Type	Status	Class Date	Session Template	Location	Facility	Actions	Price
NIH LMS Training Sample	NIH Learner	Instructor led	Confirmed	04/02/2015	NIH Thu- Fri 8:30-4:30	Sample Location	Sample Facility	Notes	0.00 USD

Order Total 0
Discount 0
Total 0

- 6.
7. The learner will be added to the roster as shown below.

Offering Details	Roster	Attendance	Results								
Roster Information											
Roster	1 of 25 seats are full. (0 Overbooked, 0 Pending Approval registration(s) could be available for manager-approved registration(s).)										
Waitlisted	0 of 10 seats are waitlisted. (0 Pending Approval registration(s) could be available for manager-approved registration(s).)										
On Demand Notification	Send										
View by Registration Status: All											
Learners											
Add Learner Print Export Modify Table											
Showing 1 out of 1 results											
First Name	Last Name	Username	Organization	Audience Subtype	Order Number	Registration Status	Approval Status	Order Status	Cancellation Reason	Mandatory	Notes
NIH	Learner	NIHLEARNER	HNAM6	Unreserved	02491463	Confirmed	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes
Cancel											

8. Additional learners may be added by repeating the previous steps in this section.

CANCEL A LEARNER REGISTRATION

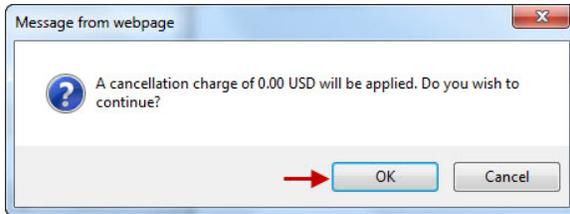
1. While [viewing the roster](#), click the **Registration Status** of the learner whose registration will be canceled.

Offering Details	Roster	Attendance	Results								
Roster Information											
Roster	1 of 25 seats are full. (0 Overbooked, 0 Pending Approval registration(s) could be available for manager-approved registration(s).)										
Waitlisted	0 of 10 seats are waitlisted. (0 Pending Approval registration(s) could be available for manager-approved registration(s).)										
On Demand Notification	Send										
View by Registration Status: All											
Learners											
Add Learner Print Export Modify Table											
Showing 1 out of 1 results											
First Name	Last Name	Username	Organization	Audience Subtype	Order Number	Registration Status	Approval Status	Order Status	Cancellation Reason	Mandatory	Notes
NIH	Learner	NIHLEARNER	HNAM6	Unreserved	02491463	Confirmed	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes
Cancel											

2. Select radio button for **Cancel this registration for this learner**.
3. Enter a comment in the Reason field to document the cancellation.
4. Click the **Save** button.

Registration Status	
Learner	NIH Learner
Status	Confirmed
Update Status	<input type="text"/> <input type="radio"/> Move to the Waitlist with priority <input checked="" type="radio"/> Cancel this registration for this learner <input type="radio"/> Cancel this registration without applying any late charge. <input type="radio"/> Move to No Show <input type="radio"/> Mark as Walk In
Reason	<input type="text" value="This learner cannot attend the training."/>
<input type="button" value="Save"/> <input type="button" value="Close"/>	

5. Click **OK** in the cancellation charge message window.



6. The learner will be removed from the active roster and their registration will be cancelled.

Offering Details **Roster** Attendance Results

Roster Information

Roster 0 of 25 seats are full. (0 Overbooked, 0 Pending Approval registration(s) could be available for manager-approved registration(s).)

Waitlisted 0 of 10 seats are waitlisted. (0 Pending Approval registration(s) could be available for manager-approved registration(s).)

On Demand Notification [Send](#)

View by Registration Status **All**

Learners [Add Learner](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

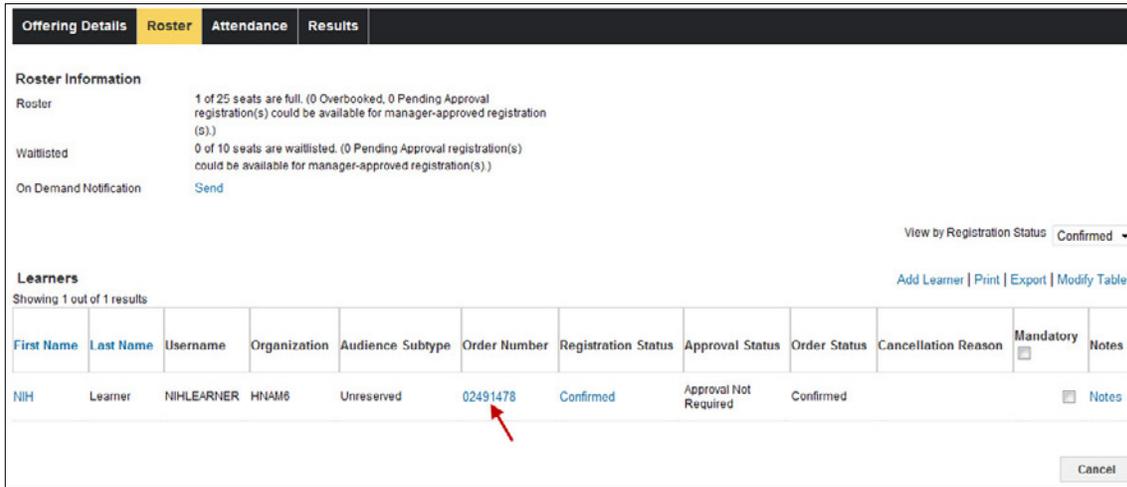
First Name	Last Name	Username	Organization	Audience Subtype	Order Number	Registration Status	Approval Status	Order Status	Cancellation Reason	Mandatory	Notes
NIII	Learner	NIII-LEARNER	HNAM6	Unreserved	02491463	Cancelled	Approval Not Required	Cancelled	This learner cannot attend the training	<input type="checkbox"/>	Notes

[Cancel](#)

RESCHEDULE A LEARNER

NOTE: Do not use this process for NIH Training Center Courses.

1. While [viewing the roster](#), click the **Order Number**.

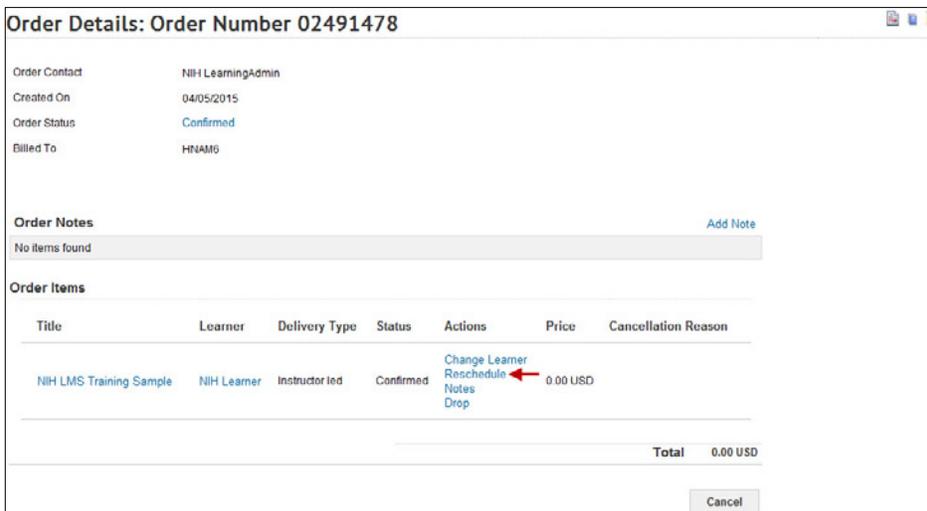


The screenshot shows the 'Roster' tab of a course offering. It includes 'Roster Information' with details on seat availability and a 'View by Registration Status' dropdown set to 'Confirmed'. Below is a 'Learners' table with one entry:

First Name	Last Name	Username	Organization	Audience Subtype	Order Number	Registration Status	Approval Status	Order Status	Cancellation Reason	Mandatory	Notes
NIH	Learner	NIHLEARNER	HNAM6	Unreserved	02491478	Confirmed	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes

A red arrow points to the 'Order Number' cell '02491478'. A 'Cancel' button is visible at the bottom right.

2. Click the **Reschedule** link in the Actions column.

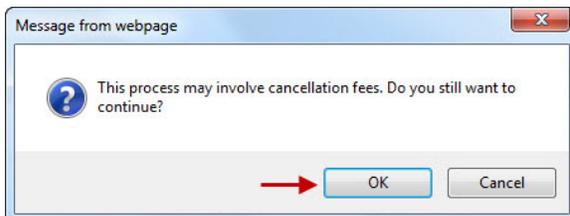


The screenshot shows the 'Order Details' page for Order Number 02491478. It includes order contact information, status, and a table of 'Order Items'.

Title	Learner	Delivery Type	Status	Actions	Price	Cancellation Reason
NIH LMS Training Sample	NIH Learner	Instructor led	Confirmed	Change Learner Reschedule Notes Drop	0.00 USD	

A red arrow points to the 'Reschedule' link in the 'Actions' column. A 'Total' of 0.00 USD is shown at the bottom right, along with a 'Cancel' button.

3. Click the **OK** button in the popup window.



4. Click the **radio button** associated with the new offering.

5. Click the **Reschedule Without Charge** button.

Reschedule: NIH LMS Training Sample

Title: NIH LMS Training Sample Location:

Keyword: Delivery Type: All

Start Date >=: 04/05/2015 Language: -Select One-

End Date <=: Category:

Facility: Competency:

Currency: US Dollars ID:

Field of Study:

Learning Offerings [Print](#) | [Export](#)

Showing 2 out of 2 results

Add	Title	Version	Delivery Type	Start Date	End Date	Session	Location	Facility	Language	Default Credits	Price	Actions
<input checked="" type="radio"/>	NIH LMS Training Sample	FY2015	Instructor led	04/09/2015	04/10/2015	NIH Thu-Fri 8:30-4:30	Sample Location	Sample Facility	English		0.00 USD	
<input type="radio"/>	NIH LMS Training Sample	FY2015	Instructor led	04/16/2015	04/17/2015	NIH Thu-Fri 8:30-4:30	Sample Location	Sample Facility	English		0.00 USD	

6. The learner's original registration will be cancelled and a new registration will be created. The learner will receive a cancellation notification followed by a registration notification.

7. Click **Cancel** to return to the roster.

Order Details: Order Number 02491478

Order Contact: NIH LearningAdmin
 Created On: 04/05/2015
 Order Status: Confirmed
 Billed To: HNAME

Order Notes [Add Note](#)

No items found

Order Items

Title	Learner	Delivery Type	Status	Actions	Price	Cancellation Reason
NIH LMS Training Sample	NIH Learner	Instructor led	Cancelled	Notes	0.00 USD	Registration has been Cancelled
NIH LMS Training Sample	NIH Learner	Instructor led	Confirmed	Change Learner Reschedule Notes Drop	0.00 USD	

Total 0.00 USD

WAITLIST A LEARNER

1. While [viewing the roster](#), click the **Registration Status** link.

The screenshot shows the 'Roster' tab of a system interface. It includes sections for 'Roster Information' and 'Learners'. The 'Learners' section displays a table with the following data:

First Name	Last Name	Username	Organization	Audience Subtype	Order Number	Registration Status	Approval Status	Order Status	Cancellation Reason	Mandatory	Notes
NIH	Learner	NIHLEARNER	HNAM6	Unreserved	02491478	Confirmed	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes

A red arrow points to the 'Confirmed' status in the 'Registration Status' column. The interface also includes a 'View by Registration Status' dropdown set to 'All' and a 'Cancel' button at the bottom right.

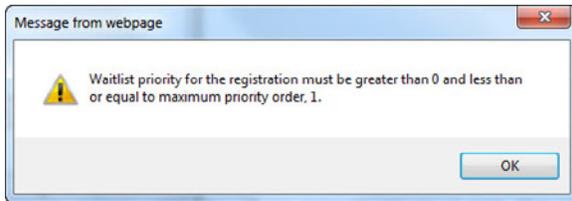
2. Select the **radio button** for Move to the Waitlist with priority.
3. Enter a priority level. This corresponds to the order the learner will be promoted from the waitlist if auto-promotion is being used. The value entered must be equal to or less than the total number of learners on the waitlist. If this is the first learner to be added to the waitlist, the priority level should be set to one (1).
4. Enter a comment in the **Reason field** if need.
5. Click the **Save button**.

The screenshot shows the 'Registration Status' dialog box for a learner. It includes the following fields and options:

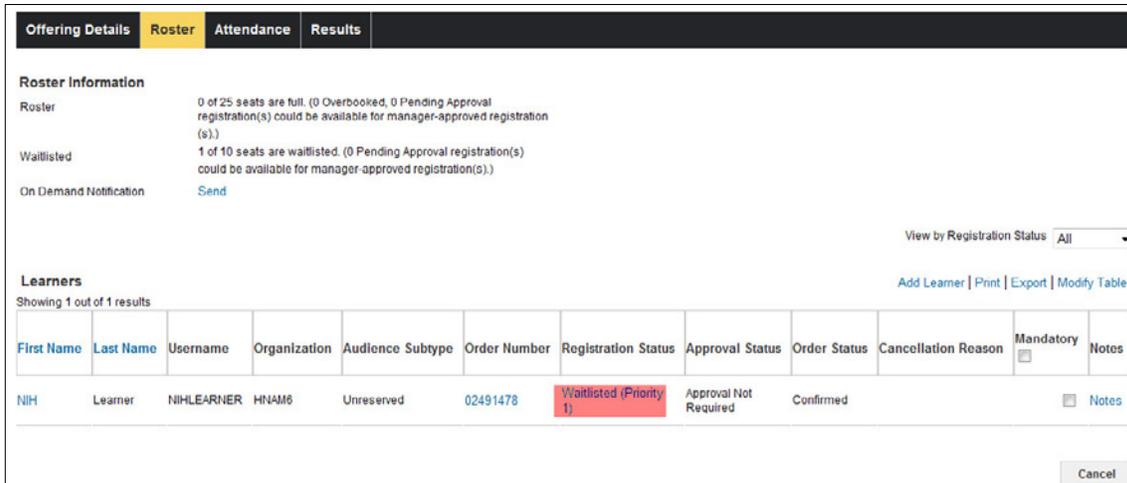
- Learner:** NIH Learner
- Status:** Confirmed
- Update Status:** A dropdown menu is set to '1'.
- Options:** A list of radio buttons for selecting an action:
 - Move to the Waitlist with priority
 - Cancel this registration for this learner
 - Cancel this registration without applying any late charge.
 - Move to No Show
 - Mark as Walk In
- Reason:** A text area for entering a comment.
- Buttons:** 'Save' and 'Close' buttons.

Red arrows point to the 'Move to the Waitlist with priority' radio button, the priority level input field containing '1', and the 'Save' button.

NOTE: If no priority level is set, an error message will be displayed as shown below.



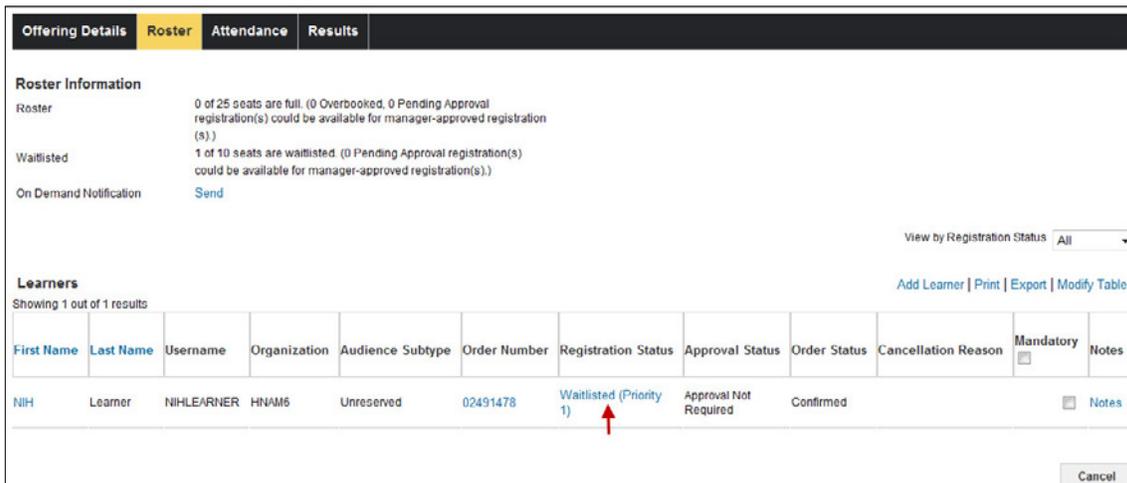
6. The learner will now appear on the roster as a waitlisted learner with the priority level indicated as well.



First Name	Last Name	Username	Organization	Audience Subtype	Order Number	Registration Status	Approval Status	Order Status	Cancellation Reason	Mandatory	Notes
NIH	Learner	NIHLEARNER	HNAM6	Unreserved	02491478	Waitlisted (Priority 1)	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes

PROMOTE A WAITLISTED LEARNER

1. While [viewing the roster](#), click the **Registration Status** link.



First Name	Last Name	Username	Organization	Audience Subtype	Order Number	Registration Status	Approval Status	Order Status	Cancellation Reason	Mandatory	Notes
NIH	Learner	NIHLEARNER	HNAM6	Unreserved	02491478	Waitlisted (Priority 1)	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes

2. Select the radio button associated with one of the two following options:

- Move into the class with confirmed status
- Move into the class with confirmed status, by increasing class count

Registration Status

Learner NIH Learner

Status Waitlisted (Priority 1)

Update Status

Move to the Waitlist with priority

→ Move into the class with confirmed status

→ Move into the class with confirmed status, by increasing class count

Cancel this registration for this learner

Move to No Show

Reason

→

3. The learner will now be moved from the waitlist to the roster with a confirmed status.

Offering Details	Roster	Attendance	Results								
Roster Information											
Roster	1 of 25 seats are full. (0 Overbooked, 0 Pending Approval registration(s) could be available for manager-approved registration(s).)										
Waitlisted	0 of 10 seats are waitlisted. (0 Pending Approval registration(s) could be available for manager-approved registration(s).)										
On Demand Notification	Send										
View by Registration Status: All ▼											
Learners											
Add Learner Print Export Modify Table											
Showing 1 out of 1 results											
First Name	Last Name	Username	Organization	Audience Subtype	Order Number	Registration Status	Approval Status	Order Status	Cancellation Reason	Mandatory	Notes
NIH	Learner	NIHLEARNER	HNAM8	Unreserved	02491478	Confirmed	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes
<input type="button" value="Cancel"/>											

ADD A “WALK-IN” LEARNER TO A ROSTER

1. While [viewing the roster](#), add the “walk-in” learner to the roster as described in the section: [Add A Learner To A Roster](#)
2. Click the **Registration Status** link of the walk-in learner.

The screenshot shows a web interface with tabs for 'Offering Details', 'Roster', 'Attendance', and 'Results'. The 'Roster' tab is active. Below the tabs is 'Roster Information' with details on seat availability and a 'Send' button for demand notifications. A 'View by Registration Status' dropdown is set to 'All'. Below this is a 'Learners' section with a table showing one learner. A red arrow points to the 'Confirmed' link in the 'Registration Status' column.

First Name	Last Name	Username	Organization	Audience Subtype	Order Number	Registration Status	Approval Status	Order Status	Cancellation Reason	Mandatory	Notes
NIH	Learner	NIHLEARNER	HNAM6	Unreserved	02491478	Confirmed	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes

3. Select the **Mark as Walk In** radio button.
4. Click the **Save** button.

The screenshot shows a 'Registration Status' dialog box. It displays the learner's name as 'NIH Learner' and the current status as 'Confirmed'. Under 'Update Status', there are four radio button options: 'Move to the Waitlist with priority', 'Cancel this registration for this learner', 'Cancel this registration without applying any late charge.', and 'Mark as Walk In'. A red arrow points to the 'Mark as Walk In' option. Below these options is a 'Reason' text area. At the bottom right, there are 'Save' and 'Close' buttons, with a red arrow pointing to the 'Save' button.

5. The learner will be shown on the roster as “Confirmed (Walk In)”.

The screenshot shows the 'Roster' tab in a system interface. Under 'Roster Information', it states: '1 of 25 seats are full. (0 Overbooked, 0 Pending Approval registration(s) could be available for manager-approved registration(s).)' and '0 of 10 seats are waitlisted. (0 Pending Approval registration(s) could be available for manager-approved registration(s).)'. A 'Send' link is provided for 'On Demand Notification'. A dropdown menu shows 'View by Registration Status' set to 'All'. The 'Learners' section shows 'Showing 1 out of 1 results' and a table with one row:

First Name	Last Name	Username	Organization	Audience Subtype	Order Number	Registration Status	Approval Status	Order Status	Cancellation Reason	Mandatory	Notes
NIH	Learner	NIHLEARNER	HNAM6	Unreserved	02491478	Confirmed (Walk In)	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes

A 'Cancel' button is at the bottom right.

MARK A CONFIRMED LEARNER AS A “NO-SHOW”

1. While [viewing the roster](#), click the **Registration Status** link.

This screenshot is identical to the previous one, but a red arrow points to the 'Confirmed' link in the 'Registration Status' column of the learner table.

2. Click the **Move to No Show** radio button.

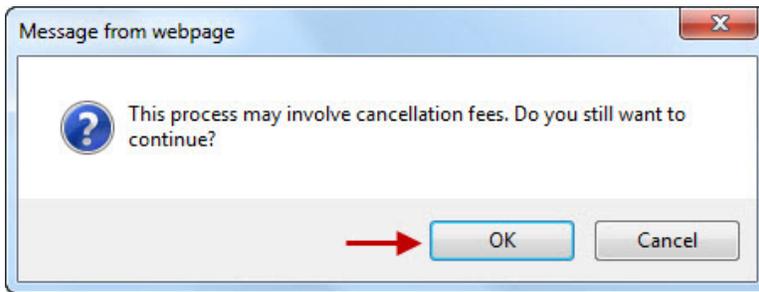
3. Click the **Save** button.

The 'Registration Status' dialog box shows the learner 'NIH Learner' with a current status of 'Confirmed'. Under 'Update Status', there are four radio button options:

- Move to the Waitlist with priority
- Cancel this registration for this learner
- Cancel this registration without applying any late charge.
- Move to No Show

A red arrow points to the 'Move to No Show' option. Below is a 'Reason' text area. At the bottom, 'Save' and 'Close' buttons are visible, with a red arrow pointing to the 'Save' button.

4. Click **OK** in the Cancellation Charge message window.



5.

6. The learner's registration will be cancelled and marked with the status "Cancelled (No Show)".

Offering Details **Roster** Attendance Results

Roster Information

Roster 0 of 25 seats are full. (0 Overbooked, 0 Pending Approval registration(s) could be available for manager-approved registration(s).)

Waitlisted 0 of 10 seats are waitlisted. (0 Pending Approval registration(s) could be available for manager-approved registration(s).)

On Demand Notification [Send](#)

View by Registration Status All

Learners [Add Learner](#) | [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

First Name	Last Name	Username	Organization	Audience Subtype	Order Number	Registration Status	Approval Status	Order Status	Cancellation Reason	Mandatory	Notes
NIH	Learner	NIHLEARNER	HNAME	Unreserved	02491478	Cancelled (No Show)	Approval Not Required	Cancelled		<input type="checkbox"/>	Notes

[Cancel](#)

CLOSING OUT AN OFFERING

RECORDING ATTENDANCE

1. While [viewing the roster](#), click the **Attendance** tab.

Offering Details **Roster** **Attendance** Results

Roster Information

Roster 4 of 25 seats are full. (0 Overbooked, 0 Pending Approval registration(s) could be available for manager-approved registration(s).)

Waitlisted 0 of 10 seats are waitlisted. (0 Pending Approval registration(s) could be available for manager-approved registration(s).)

On Demand Notification [Send](#)

View by Registration Status All

Learners Add Learner | Print | Export | Modify Table

Showing 4 out of 4 results

First Name	Last Name	Username	Organization	Audience Subtype	Order Number	Registration Status	Approval Status	Order Status	Cancellation Reason	Mandatory	Notes
NIH Learner	01	NIHLRN-01	HN761	Unreserved	02491483	Confirmed	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes
NIH Learner	02	NIHLRN-02	HN761	Unreserved	02491483	Confirmed	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes
NIH Learner	03	NIHLRN-03	HN761	Unreserved	02491483	Confirmed	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes
NIH Learner	04	NIHLRN-04	HN761	Unreserved	02491483	Confirmed	Approval Not Required	Confirmed		<input type="checkbox"/>	Notes

Cancel

2. From the **Week drop-down menu**, choose the week of the offering you will mark attendance for.
3. From the **Day drop-down menu**, choose the day of in the week of the offering you will mark attendance for.
4. To assign the same time to all learners, perform the following steps:
5. Select the **Mass-Grant to all learners radio button** to mark the attendance for all learners at once.
6. Enter the time being assigned to the learners in the **time field**.
7. Click the **Save button**.

Offering Details **Roster** **Attendance** **Results**

Select Session
 Week: Week 1 , 03/29/2015 - 04/04/2015 Day: Wednesday (08:30 a.m. - 04:30 p.m.)

Grant Attendance for Session
 Grant Manually
 Mass-Grant to all learners

HH:MM 08:00

Week 1 : Wednesday (08:30 a.m. - 04:30 p.m.)
 Showing 4 out of 4 results

Learner Name	Hours
NIH Learner 01	00:00
NIH Learner 02	00:00
NIH Learner 03	00:00
NIH Learner 04	00:00

*-unconfirmed registration

Save Clear Cancel

8. All learners will be granted the same number of hours for attendance.

Offering Details **Roster** **Attendance** **Results**

Select Session
 Week: Week 1 , 03/29/2015 - 04/04/2015 Day: Wednesday (08:30 a.m. - 04:30 p.m.)

Grant Attendance for Session
 Grant Manually
 Mass-Grant to all learners

HH:MM 00:00

Week 1 : Wednesday (08:30 a.m. - 04:30 p.m.)
 Showing 4 out of 4 results

Learner Name	Hours
NIH Learner 01	08:00
NIH Learner 02	08:00
NIH Learner 03	08:00
NIH Learner 04	08:00

*-unconfirmed registration

Save Clear Cancel

9. Repeat steps 1-4 for each day attendance was recorded.

GRANT ATTENDANCE MANUALLY - OPTIONAL

1. Click the **Grant Manually** radio button.
2. Enter the hours in the Hours field for each learner.
3. **NOTE:** You may enter the hours in the time field and then click the down arrow to populate all the learner's hours with that amount of time.
4. Click the **Save** button.

Offering Details | **Roster** | **Attendance** | **Results**

Select Session
Week: Week 1 , 03/29/2015 - 04/04/2015 | Day: Thursday (08:30 a.m. - 04:30 p.m.)

Grant Attendance for Session
 Grant Manually | HH:MM 08:00 |
 Mass-Grant to all learners

Week 1 : Thursday (08:30 a.m. - 04:30 p.m.)
Showing 4 out of 4 results

Learner Name	Hours
NIH Learner 01	06:00
NIH Learner 02	08:00
NIH Learner 03	08:00
NIH Learner 04	08:00

*-unconfirmed registration

Save | Clear | Cancel

5. In this example, all learners were granted the same number of hours except the first learner. Using the Grant Manually option allows the Hours field to be updated individually.
6. Make sure all learners have a time recorded before proceeding.

RECORD GRADES & COMPLETION STATUS

1. While [viewing the roster](#), click the **Results** tab.
2. Click the **Status drop-down menu** and select the appropriate status for each learner.
3. **NOTE:** The drop-down menu above the Learning Results table can be used to change the status of all learners at once. Select the status to be assigned to all the learners then click **Apply to All**. The exceptions can always be edited separately.

Offering Details | **Roster** | **Attendance** | **Results**

Select Session
Week: Week 1 , 03/29/2015 - 04/04/2015 | Day: Thursday (08:30 a.m. - 04:30 p.m.)

Grant Attendance for Session
 Grant Manually
 Mass-Grant to all learners

HH:MM 08:00

Week 1 : Thursday (08:30 a.m. - 04:30 p.m.)
Showing 4 out of 4 results

Learner Name	Hours
NIH Learner 01	06:00
NIH Learner 02	08:00
NIH Learner 03	08:00
NIH Learner 04	08:00

*-unconfirmed registration

Save Clear Cancel

4. Click **Apply to All** associated with the Grade. With no value entered, this will remove all zeros so that they are not recorded on the learners' transcripts. Grades that are earned can always be entered separately if needed.
5. Click the **Save** button.

MARKING AN OFFERING DELIVERED

1. Click the Status which is currently set to **Open Normal**.

Learning Details: NIH LMS Training Sample

For more details on the OPM standard EHRI Values, click [here](#).

Offering Information

ID	00085181
Instructor	
Delivery Type	Instructor led
Language	English
Location	Sample Location
Session	NIH Wed-Thu 8:30-4:30
Start Date	04/01/2015
End Date	04/02/2015
Status	Open - Normal ←

2. Enter the date the class is marked delivered then click the **Save button**.

NOTE: New learners can be added to the roster at any time after the offering has been marked delivered.

Offering Status

After an offering has been cancelled or delivered, its status cannot be changed again.

Offering 00085181

Current Status Open - Normal

Change Status to → Delivered

Delivery Date 04/02/2015 ←

Cancelled

→

3. The transcripts for all learners will be updated.

CANCEL AN OFFERING

1. Click the Status which is currently set to **Open Normal**.

Learning Details: NIH LMS Training Sample

Offering Information

ID	00085168
Instructor	
Delivery Type	Instructor led
Offering Type	Public
Language	English
Location	Sample Location
Sessions	NIH Thu- Fri 8:30-4:30
Start Date	04/09/2015
End Date	04/10/2015
Status	Open - Normal ←

2. Select the **Cancelled** radio button.
3. Click the **Save** button.

Offering Status * = required

After an offering has been cancelled or delivered, its status cannot be changed again.

Offering 00085168

Current Status Open - Normal

Change Status to

Delivered

Delivery Date 

Cancelled ←

←

4. The offering will now be cancelled.

Learning Details: NIH LMS Training Sample

Offering Information

ID	00085168
Instructor	
Delivery Type	Instructor led
Offering Type	Public
Language	English
Location	Sample Location
Sessions	NIH Thu- Fri 8:30-4:30
Start Date	04/09/2015
End Date	04/10/2015
Status	Cancelled - Normal ←

LEARNER ENROLLMENTS

An **Enrollment** is an offering that a learner is registered for, but has not completed.

VIEW A LEARNER'S ENROLLMENTS

1. Click the **Admin Icon**.



2. Click **Learning Administration** in the left menu.

3. Click **Current Learning** in the left menu.
4. Enter search criteria for the learner then click the **Search button**.
5. Click the **View Registrations link**.

Catalog

Resources

Continuing Education Plans

Learning Administration

Current Learning ←

Completed Learning

Certifications

Curricula

Continuing Education

Order History

Legacy Assessments

Knowledge Base

Production Repository

Content Tools

Pricing

Current Learning

Manage current learning for people.

Advanced Search

Person Names: NIH Learner ←

Search →

Current Learning [Print](#) | [Export](#) | [Modify Table](#)

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	→ View Registrations

NOTE: If you do not find the account you are looking for, try **Advanced Search**. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

6. You will now see the enrollments for the learner.

Current Learning for NIH Learner

View: All

Current Learning [Print](#) | [Export](#) | [Modify Table](#)

Select	Title	Delivery Type	Start Date	Location	Facility	Status	Merged From	Mandatory	Actions	Package
<input type="checkbox"/>	Alternative Dispute Resolution (ADR)	Online Training				Confirmed		<input type="checkbox"/>	Actions	
<input type="checkbox"/>	Books 24x7	Online Training				Confirmed		<input type="checkbox"/>	Actions	

MARK AN ENROLLMENT COMPLETE

This function should rarely be used since Learning Administrators are able to mark multiple completions from the roster. In the event that an offering can't be closed out, a Learning Administrator may mark the completion from the learner's enrollments area.

1. While [viewing a learner's enrollments](#), click the **Actions** link in the Actions column.
2. In the Actions popup, click the **Mark Complete** option.

Current Learning for NIH Learner

View All

Print | Export

Select	Title	Delivery Type	Start Date	Location	Facility	Status	Merged From	Mandatory	Actions
<input type="checkbox"/>	Alternative Dispute Resolution (ADR)	Online Training				Confirmed		<input type="checkbox"/>	Actions

Actions popup:
View Learning Assignments
Mark Complete
Drop

3. Click the **radio button** for successful.
4. Enter any scores, grades or comments as needed.
5. Click the **Save** button.

Progress Report for Alternative Dispute Resolution (ADR)

Offering Name: Alternative Dispute Resolution (ADR)

Learner Name: NIH Learner

Update Status To: Successful
 Not Evaluated
 Unsuccessful

Score:

Grade:

Comments: This course did not mark complete automatically.

Save Close

6. The enrollment will be removed and a transcript item created for the learner.

DROP A LEARNER ENROLLMENT

1. While [viewing a learner's enrollments](#), click the **Actions** link in the Actions column.

Current Learning for NIH Learner

View All

Print | Export

Select	Title	Delivery Type	Start Date	Location	Facility	Status	Merged From	Mandatory	Actions
<input type="checkbox"/>	Alternative Dispute Resolution (ADR)	Online Training				Confirmed		<input type="checkbox"/>	Actions

Actions

- View Learning Assignments
- Mark Complete
- Drop

2. Click the **Drop** button.

Drop Course: Alternative Dispute Resolution (ADR)

Drop Charge	0.00 USD
Title	Alternative Dispute Resolution (ADR)
Delivery Type	Online Training
ID	00004867
Start Date	-
End Date	-
Sessions	
Location	
Language	English
Description	-
Abstract	-
Domain	HHS Common
Drop Policy	N/A

Drop Back

3. The enrollment will be cancelled for the learner.

COMPLETED COURSES

The LMS maintains a transcript of all completed training. Transcripts may contain records for training delivered by NIH, the Department of Health and Human Services (HHS), in addition to training completed outside of HHS (e.g. a college course, conference, etc.). Since the LMS is a department-wide system, transcripts will go with an employee if he/she moves to another agency within HHS.

NOTE: All historic training has not yet been migrated into the LMS from existing systems. As a result, some records may not appear on a Learner's LMS transcript but can be manually added by a Local Learning Administrator.

VIEW COMPLETED COURSES

1. Click the **Admin Icon**.



2. Click **Learning Administration** in the left menu.

4. Select **Completed Learning** in the left menu.
5. Enter the learner's name in the Name(s) search field then click the **Search** button.
6. Click the **View Completed Learning** link in the Actions column.

Completed Learning

Manage completed learning for people.

Advanced Search

Person Names: NIH Learner

Search

Completed Learning Add Completed Learning | Print | Export | Modify Table

Showing 1 out of 1 results

Last Name	First Name	Username	Person Type	Actions
Learner	NIH	NIHLEARNER	Other	View Completed Learning

NOTE: If you do not find the account you are looking for, try Advanced Search. The advanced search will allow you to enter partial names, search for everyone under a specific manager or organization code, etc.

7. The transcript shows the last 90 days of training by default. To view transcript items outside of that date range, change the date range values and then click **Search**.

Completed Learning: NIH Learner

Completed learning is a list of all your completed courses and the results achieved. To export your transcript to Excel, click the Export link. To access and launch content for a completed online course, click the View Learning Assignments link.

Active | Inactive

From: 01/06/2015 To: 04/06/2015

Delivery Type: All Search

Completed Learning Add Completed Learning | Print | Export | Modify Table

Showing 2 out of 2 results

Item Name	Status	Marked Complete By	Ended/Completed On Date	Actions
Creating Your Individual Development Plan An Individual Development Plan (IDP) outlines career goals and is a developmental action plan to move you from where you are, to where you would like to be, or to where you need to be. It provides systematic steps to improve performance and build strengths related to your current job, and to meet your career goals. The goals of an IDP are developed by you with input from your supervisor. The IDP links your career interests and needs to organizational priorities. In this course, you will learn strategies for developing your own IDP and career goals. It will assist you assessing your current strengths and development needs, equipping you with the knowledge to help you move forward on your professional development path. Individuals with disabilities who need Sign Language interpreters or reasonable accommodation to participate should contact the Federal Relay (1-800-877-8339) at least 5 days in advance. Bldg: Rockledge II (6701 Rockledge Drive), Room 9100/9104	Successful		01/26/2015	View Details Edit Delete Print Certificate

EDIT A COMPLETED COURSE ITEM

IMPORTANT! Edits to completed courses should only be performed when you take possession of the credentials that warrant the changes. These credentials should be kept on file in a secure location designated by your organization's management team.

Follow the instructions below to edit a completed course item.

1. While [viewing the completed courses](#), click the **Edit link** in the Actions column of the Completed Courses table.

Completed Learning: NIH Learner

Completed learning is a list of all your completed courses and the results achieved. To export your transcript to Excel, click the Export link. To access and launch content for a completed online course, click the View Learning Assignments link

Active | Inactive

From 01/06/2015 To 04/06/2015

Delivery Type All Search

Completed Learning

Showing 1 out of 1 results

[Add Completed Learning](#) | [Print](#) | [Export](#) | [Modify Table](#)

Item Name	Status	Marked Complete By	Ended/Completed On Date	Actions
NIH Clinical Center: Fire Safety Training for Health Care Personnel This online training module is designed to review fire safety procedures including R.A.C.E. and proper use of fire extinguishers. Upon completion of the lesson, learners should be able to identify characteristics of a fire, respond effectively to a fire emergency, know how fire extinguishers work, recognize fire alarms and detection devices, and review tips to reduce the risk of fire emergencies in the NIH Clinical Center. Registration Date: 02/04/2015	Successful On: 02/04/2015 Score: 100		02/04/2015	View Details Edit Delete View Learning Assignments Print Certificate

2. Make all necessary changes then click the **Save button** at the bottom of the screen.
3. Click the **Cancel button** to return to the learner's completed courses.

Transcript Details

Completed Learning Details

Course Name: NIH Clinical Center. Fire Safety Training for Health Care Personnel

Learner Name: NIH Learner

ID: NIHCCFS2014

Description: This online training module is designed to review fire safety procedures including R.A.C.F. and proper use of fire extinguishers. Upon completion of the lesson, learners should be able to identify characteristics of a fire, respond effectively to a fire emergency, know how fire extinguishers work, recognize fire alarms and detection devices, and review tips to reduce the risk of fire emergencies in the NIH Clinical Center.

Completion Status: Successful

Marked Complete by:

Delivery Type: Online Training

Offering Start Date:

Ended/Completed On Date: 02/04/2015

Registration Date: 02/04/2015

Marked Complete Date: 02/04/2015

Start Time(HH:MM):

End Time(HH:MM):

Duration(HH:MM): 01:00

Location:

Score: 100

Grade:

Default Credits: 0

Other Information

EHRI: Training Duty Hours (1101):

EHRI: Training Non Duty Hours (1102): 0

EHRI: Training Per Diem Cost (1103): 0

EHRI: Training Travel Cost (1104): 0

EI IRI: Training Nongovernment Contribution Cost (1105): 0

EI IRI: Training Travel Indicator (1106): No

EHRI: Continued Service Agreement Expiration Date (1230):

Results by Module [Print](#) | [Export](#) | [Modify Table](#)

Module	Requirement	Completion Status	Details	Results
NIH Clinical Center Fire Safety Training for Health Care Personnel	Required	Successful	Attempts Allowed: Unlimited Score: 100.00	View

Attachments [Add Attachment](#)

No items found

UPLOAD AN EXTERNAL DOCUMENT

Learning Administrators can upload external documents such as the certificate of completion that was received after completing a course. Follow the instructions below to upload a document that will be attached to the completed course item.

1. While [editing a completed course item](#), scroll to the bottom of the screen and click the **Add Attachment link**.



The screenshot shows a box titled "Attachments" with a red arrow pointing to the "Add Attachment" link. Below the title, it says "No items found". At the bottom right, there are "Save" and "Cancel" buttons.

2. Enter a name for the certificate of completion.
3. Select URL or File **radio buttons** and enter the path where the file may be found.

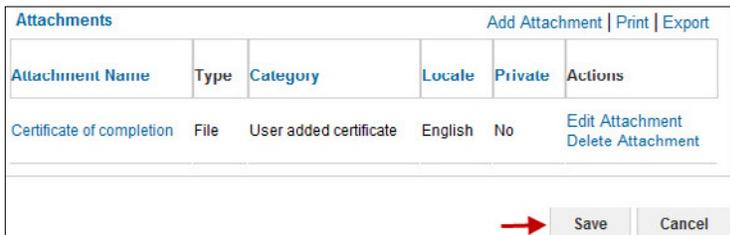


The screenshot shows the "New Attachment" form. It has a red arrow pointing to the "Save" button. The form includes the following fields:

- Attachment Name***: Certificate of completion
- Type***: URL, File
- Category***: User added certificate
- Locale***: English
- Is Private**:

At the bottom right, there are "Save" and "Close" buttons. A red arrow points to the "Save" button.

4. The certificate will now be attached to the completed course item.



The screenshot shows the "Attachments" section with a table of attachments. A red arrow points to the "Save" button at the bottom right.

Attachment Name	Type	Category	Locale	Private	Actions
Certificate of completion	File	User added certificate	English	No	Edit Attachment Delete Attachment

At the bottom right, there are "Save" and "Cancel" buttons. A red arrow points to the "Save" button.

DELETE A COMPLETED COURSE ITEM

IMPORTANT! Once a transcript item is deleted, the action cannot be undone. A new transcript item would need to be added if one was deleted unintentionally.

1. While [viewing completed courses](#), click the **Delete** link in the Actions column.

Completed Learning: NIH Learner

Completed learning is a list of all your completed courses and the results achieved. To export your transcript to Excel, click the Export link. To access and launch content for a completed online course, click the View Learning Assignments link.

Active | Inactive

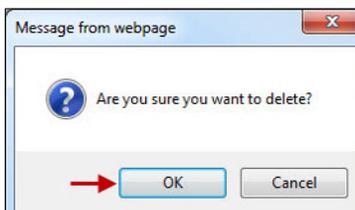
From: 01/06/2015 To: 04/06/2015
Delivery Type: All Search

Completed Learning Add Completed Learning | Print | Export | Modify Table

Showing 2 out of 2 results

Item Name	Status	Marked Complete By	Ended/Completed On Date	Actions
Creating Your Individual Development Plan An Individual Development Plan (IDP) outlines career goals and is a developmental action plan to move you from where you are, to where you would like to be, or to where you need to be. It provides systematic steps to improve performance and build strengths related to your current job, and to meet your career goals. The goals of an IDP are developed by you with input from your supervisor. The IDP links your career interests and needs to organizational priorities. In this course, you will learn strategies for developing your own IDP and career goals. It will assist you assessing your current strengths and development needs, equipping you with the knowledge to help you move forward on your professional development path. Individuals with disabilities who need Sign Language Interpreters or reasonable accommodation to participate should contact the Federal Relay (1-800-877-8339) at least 5 days in advance. Bldg: Rockledge II (6701 Rockledge Drive), Room 0110151104	Successful On: 01/26/2015 Score: 0			View Details Edit Delete Print Certificate

2. Click the **OK** button in the confirmation popup window.



3. The completed course item will be deleted and will now be added to the Inactive tab. To see all the items that have previously been deleted, click the Inactive tab.

IMPORTANT! Only completed courses on the Active tab will be factored into completion reports.

ADDING COMPLETED COURSE ITEMS USING AN EXISTING ITEM

Learning Administrators may manually add additional training to a learner's list of completed courses. The types of learning that are frequently added manually are:

- External training that was completed outside of NIH/HHS
- NIH/HHS training that is not in the LMS catalog
- LMS catalog courses that could not be added by a Learning Administrator during the time completions were being marked

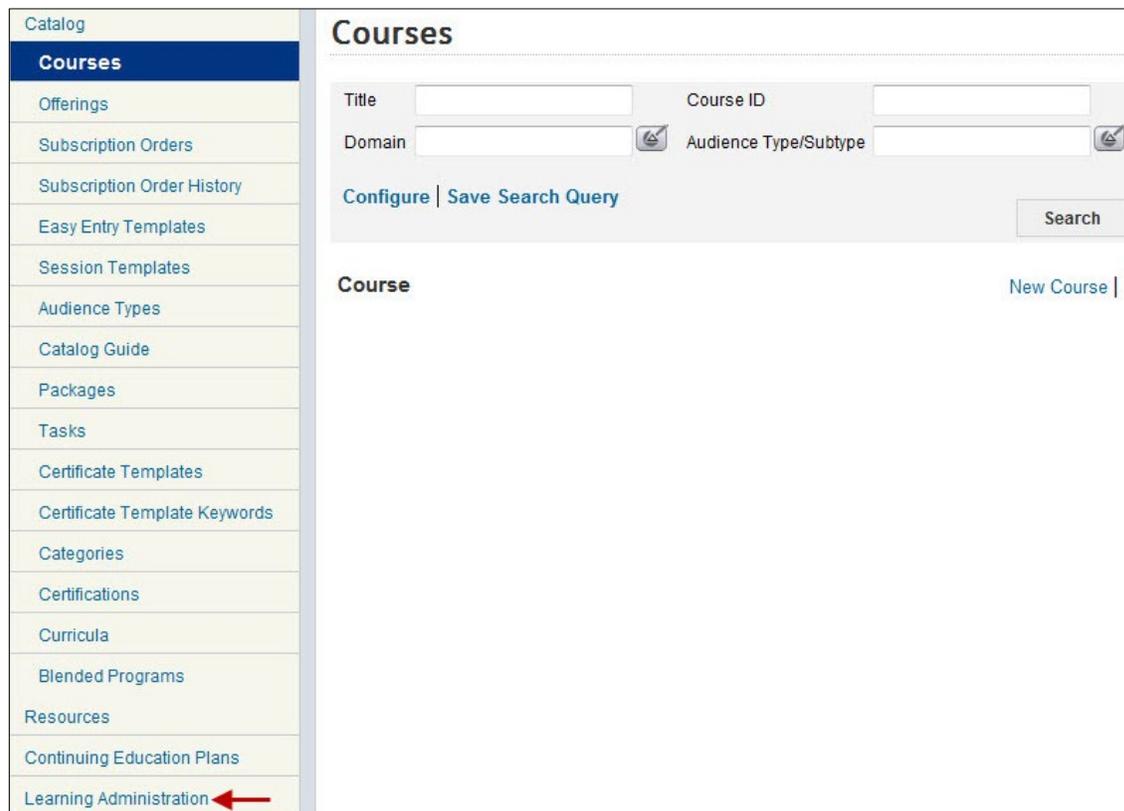
IMPORTANT! The guidelines for verifying completed training may vary by IC, office, division, etc. Please be sure to check with your organization to determine the process for verifying the completion of training prior to manually entering it.

Follow the instructions below to add a course that already exists on another learner's transcript.

1. Click the **Admin Icon**.



2. Click **Learning Administration** in the left menu.



3. Select **Completed Learning** in the left menu.
4. Click the **Add Completed Learning** link.

Catalog

Resources

Continuing Education Plans

Learning Administration

Current Learning

Completed Learning

Certifications

Curricula

Continuing Education

Order History

Legacy Assessments

Knowledge Base

Completed Learning

Manage completed learning for people.

Advanced Search

Person Names

Search

Completed Learning [Add Completed Learning](#)

5. Click the **Use Existing Item** link.

Add Completed Learning to Learner's Transcript

For information on EHRI values, please refer to the [OPM Guide to Data Standards](#).

[Use Existing Item](#)

Item/Event Name*

Description

Character Limit: 1000

Offering Start Date

Ended/Completed On Date

Registration Date

Marked Complete Date*

6. Select the radio button for **Search Existing Completed Course Items**.
7. Enter a **course ID** or a **course name** then click the **Search** button.
8. **NOTE:** If the training being added is not in the LMS catalog or already added to someone else's transcript, it cannot be found in the LMS as an existing item. Follow the steps in the Adding A Course Not Found In The LMS Catalog if the course is not an existing item.

9. Click the **checkbox** associated with the course.

Search for Items to Add a Completed Learning to Learner's Transcript

Name:

ID:

Search Existing Completed Learning Items
 Search Catalog

[Print](#) | [Export](#)

Showing 1 out of 1 results

Title	Version	Description	Course ID
<input type="checkbox"/> BUILDING A DATABASE USING EXCEL	1.0	Create a database using Excel to generate the field names. Learn to use the Data Form to enter the data into the database. Apply filters to only display the data you want. Learn some of Excel's Advanced functions to ask your database a question and receive answers. Learn to quickly make your data look consistent. Work with Rows and Columns to hide and display data as desired. Learn multiple ways to sort data and use Import / Export to bring data in and out of Excel. Analyze your data without having multiple copies of the same data to look at it in different ways.	IT8222

10. Enter data into remaining fields as appropriate for the course.

11. Click the **Add Learners** link.

Edit Item Added to Completed Learning

[Use Existing Item](#)

Item/Event Name	BUILDING A DATABASE USING EXCEL
Version	1.0
Description	Create a database using Excel to generate the field names. Learn to use the Data Form to enter the data into the database. Apply filters to only display the data you want. Learn some of Excel's Advanced functions to ask your database a question and receive answers. Learn to quickly make your data look consistent. Work with Rows and Columns to hide and display data as desired. Learn multiple ways to sort data and use Import / Export to bring data in and out of Excel. Analyze your data without having multiple copies of the same data to look at it in different ways.
Offering Start Date	04/01/2015
Ended/Completed On Date	04/01/2015
Registration Date	04/01/2015
Marked Complete Date*	04/01/2015
Start Time (HH:MM)	09:00
End Time (HH:MM)	12:00
Duration (HH:MM)	03:00
Delivery Type	Traditional Classroom
Course ID	IT8222
Location	NIH
Marked Complete By	NIHLEARNINGADMIN

Other Information

EHR: Training Accreditation Indicator (1102)	Non Applicable
Training Accreditation Organization Type (1103)	
Course ID From Vendor (1105)	
EHR: Training Source Type Code (1120)	Government Internal
EHR: Training Purpose Type Code (1122)	Program/Mission Change
EHR: Training Type Sub Code (1124)	Information Technology
EHR: Training Credit (1126)	
EHR: Training Credit Designation Type Code (1127)	
EHR: Training Delivery Type Code (1129)	Traditional Classroom (no technology)
EHR: Training Credit Type Code (1131)	
Instructor Competencies (1200)	
Multilingual Course (1201)	
Internal or External Course (1202)	Internal
Training Certification Type (1211)	
Course Development Cost (1220)	0
EHR: Training Tuition and Fees Cost (1221)	0
EHR: Training Materials Cost (1222)	
EHR: Continued Service Agreement Required Indicator (1231)	
EHR: Training Duty Hours (1101)	
EHR: Training Non Duty Hours (1102)	0
EHR: Training Per Diem Cost (1103)	0
EHR: Training Travel Cost (1104)	0
EHR: Training Nongovernment Contribution Cost (1105)	0
EHR: Training Travel Indicator (1106)	No
EHR: Continued Service Agreement Expiration Date (1230)	

Continuing Education Credits

No items found

Learners

[Add Learners](#)

No items found

Competencies

No items found

Notes

No items found

12. Enter search criteria for the learner(s) to receive credit for the course then click the **Search button**.

13. Click the **checkbox** associated with the learner then click the **Select button**.

Supervisors: you can easily display all of **your staff** by entering your **login ID** into the "**Manager**" field, clicking the **Magnifying Glass** graphic, and then clicking the "**Search**" button.

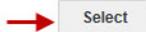
Population*	Internal	First Name	NIH
Last Name	Learner	Person ID	
Username		Manager	
Organization		Location	
Domain		Person Type	
Security Roles	-Select One-	Include All Suborganizations	<input type="checkbox"/>



Select

People [Print](#) | [Export](#)

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input type="checkbox"/>	NIH	Learner	NIHLEARNER	Other	00165395	HNAM6		NIHMANAGER



14. Delete the zero from the **Score field**.

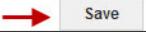
15. Click the **Save button**.

Learners [Add Learners](#) | [Modify Table](#)

Name	Start Date	Date Marked Complete	Score	Grade	Completion Status	Actions
NIH Learner	04/01/2015	04/01/2015			Successful	Delete

Competencies
No items found

Notes
No items found



16. The course will now become part of the learner's completed course items.

ADDING A COURSE NOT FOUND IN THE LMS

1. Click the **Admin Icon**.



2. Click **Learning Administration** in the left menu.

Catalog

- Courses
- Offerings
- Subscription Orders
- Subscription Order History
- Easy Entry Templates
- Session Templates
- Audience Types
- Catalog Guide
- Packages
- Tasks
- Certificate Templates
- Certificate Template Keywords
- Categories
- Certifications
- Curricula
- Blended Programs
- Resources
- Continuing Education Plans
- Learning Administration ←

Courses

Title Course ID

Domain Audience Type/Subtype

[Configure](#) | [Save Search Query](#)

Course [New Course](#)

3. Select **Completed Learning** in the left menu.
4. Click the **Add Completed Learning** link.

Catalog

Resources

Continuing Education Plans

Learning Administration

Current Learning

Completed Learning

Certifications

Curricula

Continuing Education

Order History

Legacy Assessments

Knowledge Base

Completed Learning

Manage completed learning for people.

Advanced Search

Person Names

Search

Completed Learning  Add Completed Learning

5. Enter the following data:
 - **Item/Event Name** – The actual name of the course, workshop, conference, etc.
 - **Dates** – Marked Complete Date is required. This date shows up on the certificate. Enter all dates if known.
 - **Time** – Uses 24 clock and must be entered in a ##:## format.
 - **Delivery Type** – Enter the method of delivery.
 - **Course ID** – The unique course number associated with the course.
 - **Location** – Enter the location of the training.
 - **Marked Complete By** – Enter the administrator that is adding the course.

Add Completed Learning to Learner's Transcript

For information on EHRI values, please refer to the [OPM Guide to Data Standards](#).

[Use Existing](#)

Item/Event Name* UMD College Course

Description Graduate course.

Character Limit: 1000
Remaining character count: 984

Offering Start Date 04/01/2015

Ended/Completed On Date 04/01/2015

Registration Date 04/01/2015

Marked Complete Date* 04/01/2015

Start Time (HH:MM) 11:00

End Time (HH:MM) 13:00

Duration (HH:MM) 02:00

Delivery Type Instructor led

Course ID* UMD1001

Location UMD College Park

Marked Complete By NIHLEARNINGADMIN

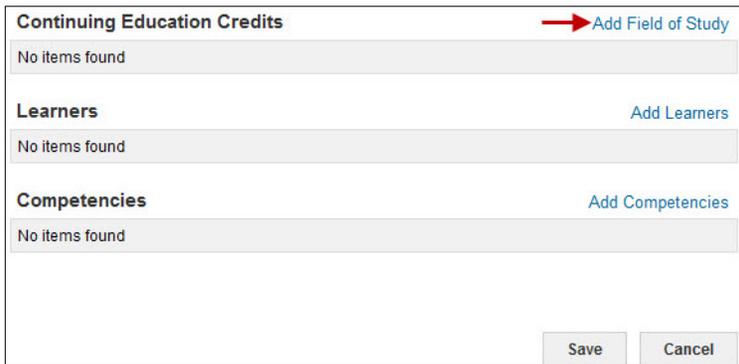
Add EHRI data in the Other Information section.

IMPORTANT! All EHRI values included at the bottom of this page should be validated. If any of the values are incorrect, the transcript item should be cancelled and the values corrected in the LMS course catalog by an LMS Learning Administrator. (See [Appendix B](#) for explanations of data fields required for EHRI reporting.)

Other Information	
Training Accreditation Organization Type (1103)	NA
Course ID From Vendor (1105)	UMDCP1001
EHRI: Training Credit (1126)	0
EHRI: Training Credit Designation Type Code (1127)	Other
EHRI: Training Delivery Type Code (1129)	Traditional Classroom (no technology)
EHRI: Training Credit Type Code (1131)	NA (Not Applicable)
Instructor Competencies (1200)	
Multilingual Course (1201)	
Internal or External Course (1202)	External
Training Certification Type (1211)	NA
Course Development Cost (1220)	0
EHRI: Training Tuition and Fees Cost (1221)	450
EHRI: Training Materials Cost (1222)	80
EHRI: Continued Service Agreement Required Indicator (1231)	NA
EHRI: Training Accreditation Indicator (1102)	Non Applicable
EHRI: Training Source Type Code (1120)*	Non-government
EHRI: Training Purpose Type Code (1122)	Develop Unavailable Skills
EHRI: Training Type Sub Code (1124)	Leadership Development Program
EHRI: Training Duty Hours (1101)	2
EHRI: Training Non Duty Hours (1102)	0
EHRI: Training Per Diem Cost (1103)	0
EHRI: Training Travel Cost (1104)	0
EHRI: Training Nongovernment Contribution Cost (1105)	0
EHRI: Training Travel Indicator (1106)	No
EHRI: Continued Service Agreement Expiration Date (1230)	NA

ADDING A FIELD OF STUDY FOR CLP TRACKING

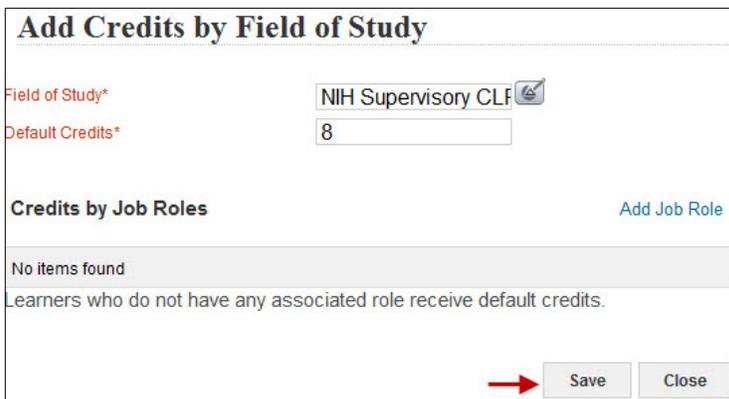
1. Click the **Add Field Of Study** link.



The screenshot shows a form titled "Continuing Education Credits" with a red arrow pointing to the "Add Field of Study" link in the top right corner. Below the title, there are three sections: "Learners" and "Competencies", each with a "No items found" message and an "Add" link. At the bottom right, there are "Save" and "Cancel" buttons.

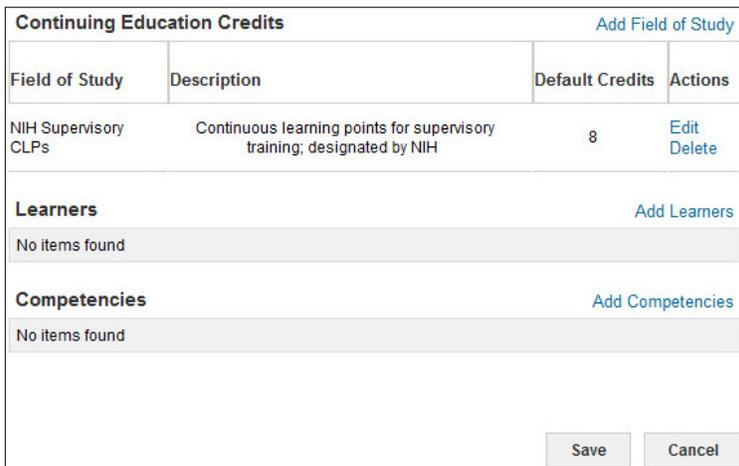
2. Locate the field of study and enter the number of credits.

3. Click the **Save** button.



The screenshot shows a form titled "Add Credits by Field of Study". It has two input fields: "Field of Study*" with the value "NIH Supervisory CLF" and "Default Credits*" with the value "8". Below these is a section titled "Credits by Job Roles" with an "Add Job Role" link and a "No items found" message. A note states "Learners who do not have any associated role receive default credits." At the bottom right, a red arrow points to the "Save" button, with a "Close" button next to it.

4. The field of study will now be added to the course.



The screenshot shows the "Continuing Education Credits" form after the field of study has been added. The "Add Field of Study" link is now blue. A table is displayed with the following data:

Field of Study	Description	Default Credits	Actions
NIH Supervisory CLPs	Continuous learning points for supervisory training; designated by NIH	8	Edit Delete

Below the table are the "Learners" and "Competencies" sections, each with a "No items found" message and an "Add" link. At the bottom right, there are "Save" and "Cancel" buttons.

ADDING LEARNERS TO RECEIVE COMPLETED COURSES

1. Click the **Add Learners** link.

Continuing Education Credits [Add Field of Study](#)

No items found

Learners [Add Learners](#)

No items found

Competencies [Add Competencies](#)

No items found

2. Enter search criteria for a learner then click the **Search** button.
3. Click the **checkbox** associated with the learner then click the **Select** button.

Search Person, Internal

Supervisors: you can easily display all of **your staff** by entering your **login ID** into the **"Manager"** field, click the **Magnifying Glass** graphic, and then clicking the **"Search"** button.

Population* First Name

Last Name Person ID

Username Manager

Organization Location

Domain Person Type

Security Roles Include All Suborganizations

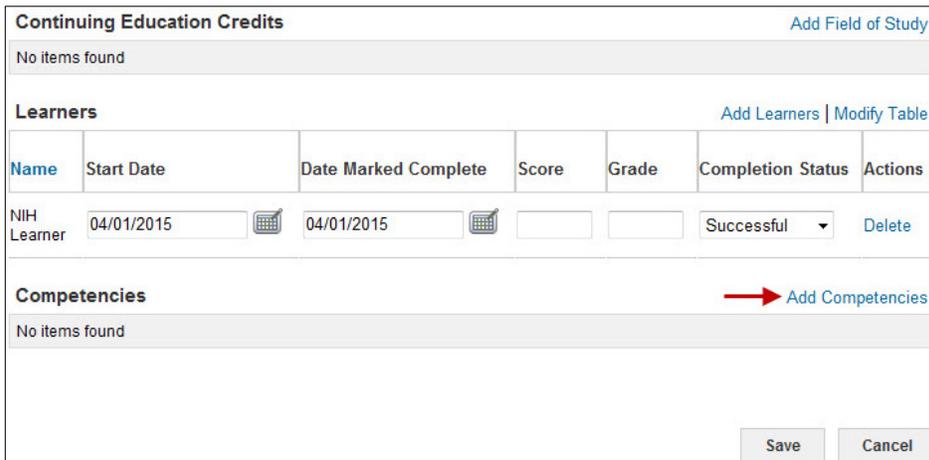
[Print | Export](#)

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	NIH	Learner	NIHLEARNER	Other	00165395	HNAM6		NIHMANAGER

4. The learner will now be added as a recipient of the completed course.
5. Remove the zero in the grade column before saving.

ADDING COMPETENCIES TO A COMPLETED COURSE

1. Click the **Add Competencies** link.

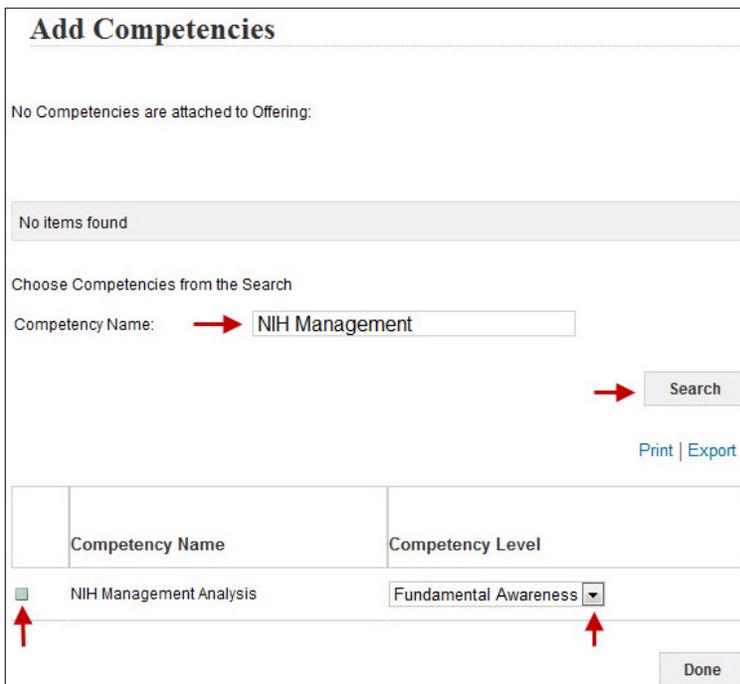


The screenshot shows a web interface for 'Continuing Education Credits'. At the top right, there is a link 'Add Field of Study'. Below this, a message states 'No items found'. A section titled 'Learners' contains a table with columns: Name, Start Date, Date Marked Complete, Score, Grade, Completion Status, and Actions. One learner is listed: 'NIH Learner' with a start date of '04/01/2015' and a completion status of 'Successful'. To the right of the 'Learners' section is a link 'Add Learners | Modify Table'. Below the table is a section titled 'Competencies' with a message 'No items found' and a red arrow pointing to a link 'Add Competencies'. At the bottom right, there are 'Save' and 'Cancel' buttons.

2. Type the **name of the competency** then click the **Search** button.

3. Select the **competency level** from the pull-down menu.

4. Click the **checkbox** associated with the competency.



The screenshot shows a dialog box titled 'Add Competencies'. It contains the text 'No Competencies are attached to Offering:'. Below this is a message 'No items found'. A section titled 'Choose Competencies from the Search' has a text input field for 'Competency Name' containing 'NIH Management' and a 'Search' button. Below the search section are links for 'Print | Export'. A table lists search results with columns 'Competency Name' and 'Competency Level'. One result is shown: 'NIH Management Analysis' with a 'Fundamental Awareness' level. A checkbox is checked next to this entry. At the bottom right, there is a 'Done' button. Red arrows point to the 'Competency Name' input, the 'Search' button, the checkbox, and the 'Competency Level' dropdown.

5. Click the **Done** button.

Add Competencies

No Competencies are attached to Offering:

[Print](#) | [Export](#) | [Modify Table](#)

Competency Name	Competency Level	Actions
NIH Management Analysis	Fundamental Awareness	Delete

Choose Competencies from the Search

Competency Name:



6. The competency will now be added to the completed course item. Repeat these steps to add additional competencies.

Continuing Education Credits

[Add Field of Study](#)

No items found

Learners

[Add Learners](#) | [Modify Table](#)

Name	Start Date	Date Marked Complete	Score	Grade	Completion Status	Actions
NIH Learner	<input type="text" value="04/01/2015"/> 	<input type="text" value="04/01/2015"/> 	<input type="text"/>	<input type="text"/>	Successful ▾	Delete

Competencies

[Add Competencies](#) | [Modify Table](#)

Name	Competency Level
NIH Management Analysis	Fundamental Awareness



7. The course will now be added to the learner's list of completed courses. Please [view the complete courses](#) to make sure the course was saved properly.

REPORTS

GENERATE REPORTS

Learning Administrators have access to a variety of reports in the LMS. Reports can be generated, exported, printed, emailed and subscribed to if desired. The reports that are available for the roles of Learning Administrator and Content Administrator are unique to the specific role used to access them.

Follow the instructions below to run a report in the LMS.

1. Click the **Admin Icon**.



2. Click **Reports** in the left menu.

Catalog

- Courses**
- Offerings
- Subscription Orders
- Subscription Order History
- Easy Entry Templates
- Session Templates
- Audience Types
- Catalog Guide
- Packages
- Tasks
- Certificate Templates
- Certificate Template Keywords
- Categories
- Certifications
- Curricula
- Blended Programs
- Resources
- Continuing Education Plans
- Learning Administration
- Legacy Assessments
- Knowledge Base
- Production Repository
- Content Tools
- Pricing
- Reports

Courses

Title Course ID

Domain Audience Type/Subtype

[Configure](#) | [Save Search Query](#)

Course [New Course](#)

3. Enter the name of the report in the **Name field**.
4. Click the **Search button**.
5. Click the **Actions link** in the Actions column.
6. Click **Execute** in the popup window.

NOTE: To see a list of all the available reports in the LMS, click the Search button without entering any other criteria.

All reports are assigned to categories. To view all of the reports in a category, select the category from the category pull-down menu and then click the Search button.

The HHS Custom Reports Category contains all of the reports that have been custom designed for NIH and all of HHS.

Reports

Reports contain data that you can use for analysis and decision-making. They can be printed or exported (hover over the Actions link for options)

Learning Content

Name: HHS Training Completion Category: Select One

Report Template: [icon]

Configure | Save Search Query Search

Print | Export | Modify T

Name	Report Template	Description	Engine Type	Actions
HHS Training Completion Detail	HHS Training Completion Detail	Custom report that displays transcript detail based on 3 required parameters and 4 optional parameters	Managed Report	Actions

Actions: Email, Execute, Subscribe

7. Enter parameters required to run the report.
8. Enter report parameters into the appropriate fields. The parameters will vary depending upon the report being run.

IMPORTANT! Fields labeled with red letters are required in order to run the report.

NOTE: Many reports will use the organization code as a required parameter. Use the % symbol to include sub-organizations.

9. Click the **Generate Report button**.

Report Parameters - HHS Training Completion Detail

Course Title (Equivalents incl. in results)* 

Completion Start Date* 

Completion End Date* 

Organization ID (Use % to include sub-orgs)*

EOD Start Date (mm/dd/yyyy)

EOD End Date (mm/dd/yyyy)

Person Type

Person Status



10. You will now see a report similar to what is shown in the graphic below.

NOTE: Depending on the amount of data being pulled, some reports may take longer than others to run. Try using a subscription or email the report to yourself to reduce waiting times.

HHS Enrollment Snapshot Report



Offering Owner:

Course ID: NIHLMS00001

Domain:

From Date: 04/01/2015

To Date: 04/30/2015

Title	Course ID	Offering ID	Start Date	Min Cnt	Max Cnt	# Approved	# Pending	# Waitlisted	# Approval Not Required
NIH LMS Training Sample	NIHLMS00001	00085133	04/02/2015	5.00	25.00	0.00	0.00	0.00	0.00
NIH LMS Training Sample	NIHLMS00001	00085168	04/09/2015	5.00	25.00	0.00	0.00	0.00	0.00
NIH LMS Training Sample	NIHLMS00001	00085169	04/16/2015	5.00	25.00	0.00	0.00	0.00	4.00

EXPORT A REPORT

Once a report is generated, it can be exported from the LMS into other file formats. Of these, “Adobe Acrobat – PDF” and “Microsoft Excel 97-2000 – Data Only (XLS)” are the most commonly used.

Follow the instructions below to export an LMS report.

1. While [viewing an LMS report](#), click the Export button in the Reports Menu Bar in the upper left-hand corner.



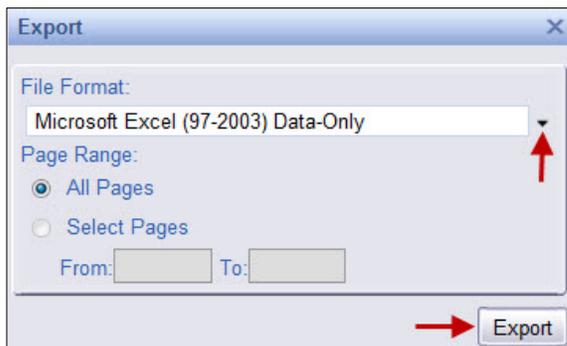
2. Select the file format you want to export the report data into from the **File Format pull-down menu**.

NOTE: The following two formats are the most commonly used:

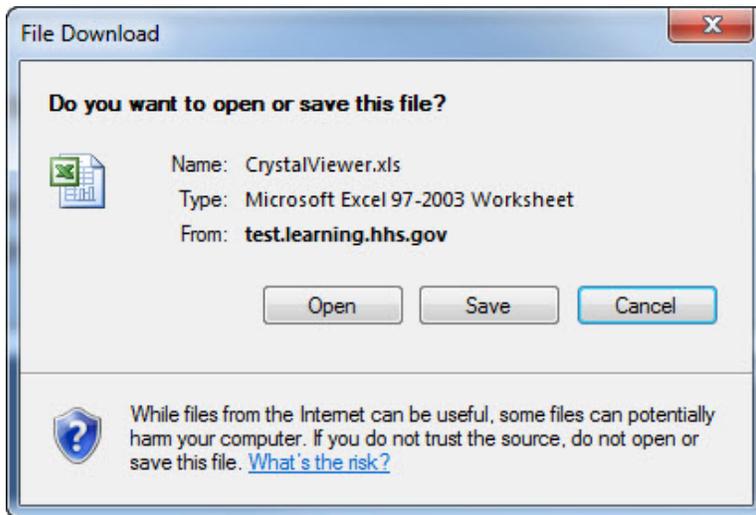
- The **Adobe Acrobat (PDF)** format will export a report ready for printing or to be saved and emailed.
 - The **Microsoft Excel 97-2000 – Data Only (XLS)** format will export a report ready to open in MS Excel so you can work with the data.
3. Select the range of pages that should be exported. All pages in the report will be exported unless a specific page range is defined.

NOTE: The Page Range option during export is not available for all export formats.

4. Click **Export**.

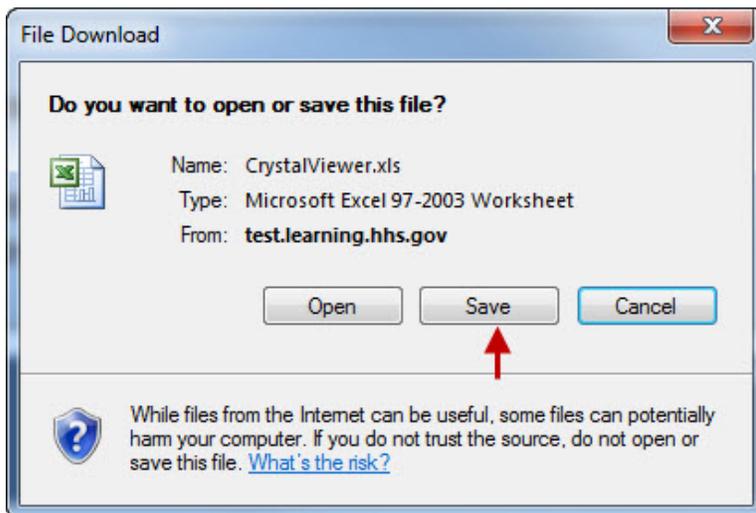


5. You will be prompted to open or save the file.
 - a. Clicking **Save** will allow you to save the file before opening.
 - b. Clicking **Open** will open the data in the chosen format.

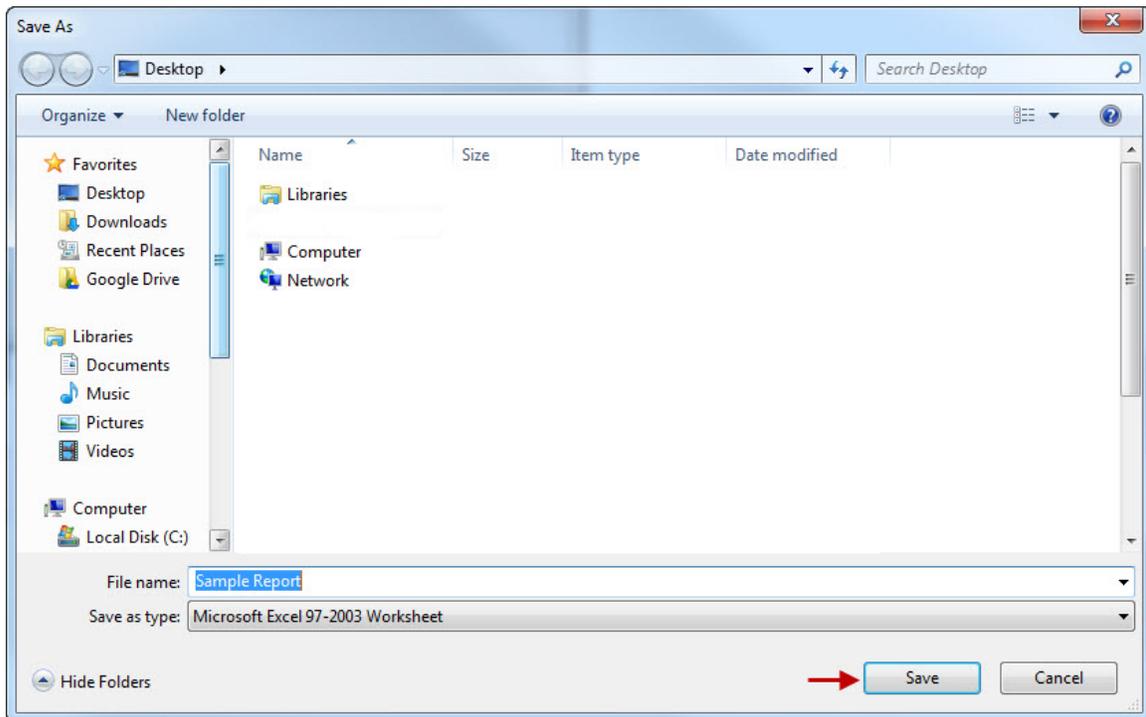


SAVING AN EXPORTED REPORT

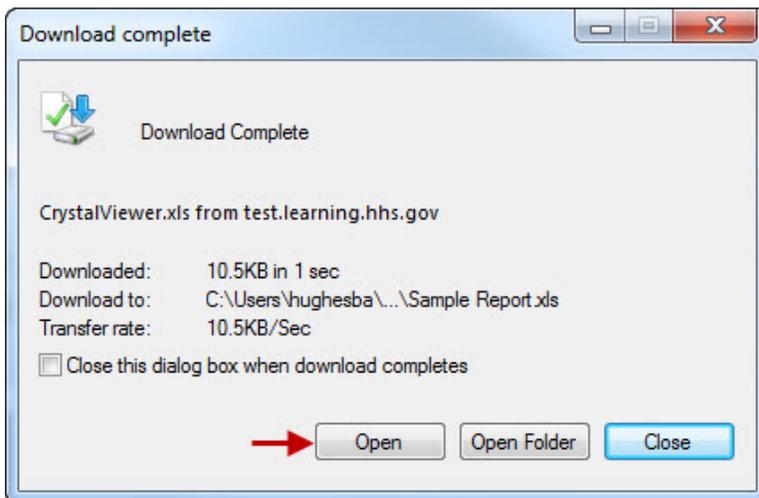
1. While viewing the File Download popup window, click the **Save button**.



2. Select a location in which to save the file and give it a meaningful name.
3. Click the **Save button**.



4. You will receive a prompt when the download is complete. Click **Open** to open the report file you just downloaded.

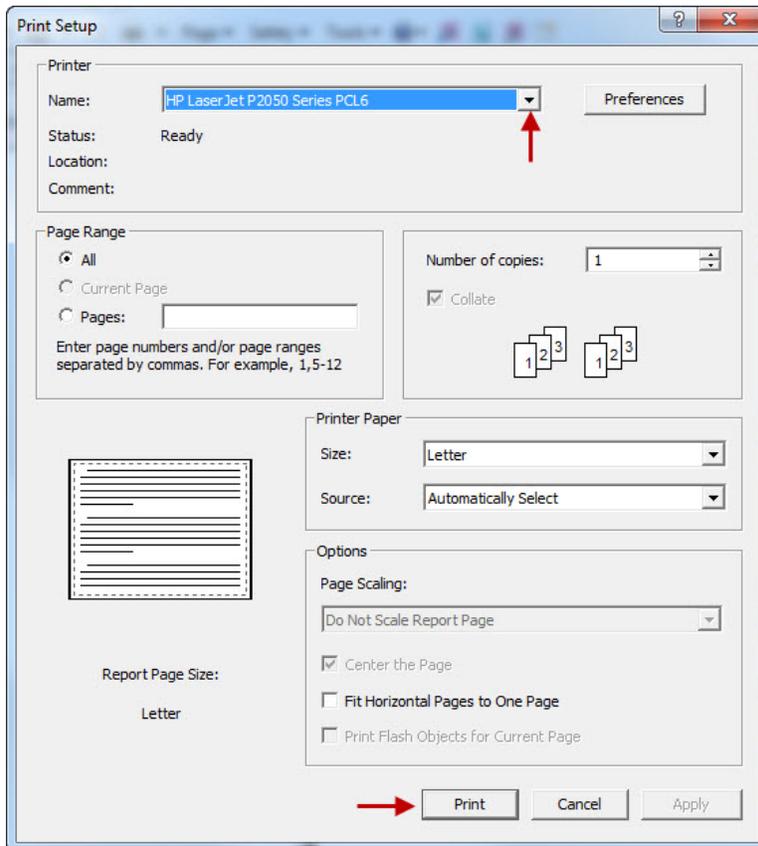


PRINT A REPORT

1. While [viewing an LMS report](#), click the **printer icon** in the Reports Menu Bar.



2. Select a printer to receive the report.
3. Click the **Print button**.



5. The report will now be printed on the selected printer.

EMAIL A REPORT

The LMS allows reports to be emailed, on-demand, to any valid email address. Those who receive the email do not need to log on or have access to the LMS in order to view the emailed report.

1. Click the **Admin Icon**.



2. Click **Reports** in the left menu.
3. Enter the name of the report in the **Name field**.
4. Click **Search**.
5. Click the **Actions link** in the Actions column.
6. Click the **Email link** in the Actions popup window.

Name	Report Template	Description	Engine Type	Actions
HHS Enrollment Snapshot Report	HHS Enrollment Snapshot Report	This report returns a snapshot of roster details for offerings of a given owner, course or domain in a given date range. ** Note: One of the following parameters shall also be required: Offering Owner, Course ID, Domain. The Date range not to exceed one year.	Managed Report	Actions

7. Enter one or more recipient email addresses in the **To** field. (Separate multiple emails with either a comma or semi-colon)
8. Modify the **Subject** and **Mail Text** (the email body) fields to appear as you want them in the email.
9. Choose a **Report Format** from the report format pull-down menu.
10. Enter all remaining report parameters.
11. **NOTE:** The remaining parameters will vary by report. All fields labeled with red letters require data to email the report.
12. Click the **Preview button** to see the report based with the parameters you entered.
13. Click the **Send button** to send the report to the email recipient(s).

Email HHS Enrollment Snapshot Report

Run Reports > Email HHS Enro...

To Email Address(es) (Enter one or more email addresses separated by semi-colons (;). Example: jdoe@email.com; msmith@email.com)*

NIHLearner@nih.gov

Character Limit:255

Subject* HHS Enrollment Snapshot Report

Mail Text* From NIH Learning Admin

Character Limit:255

Report Format* Acrobat Format (PDF)

Select one of the following: Offering Owner

NIHLEARNINGADMIN

Course ID

Domain

From Date* Fixed Date

* Enter Date 04/01/2015

To Date* Fixed Date

* Enter Date 04/30/2015

Preview Report Send Cancel

12. The report will be sent to all people with valid emails in the To field.

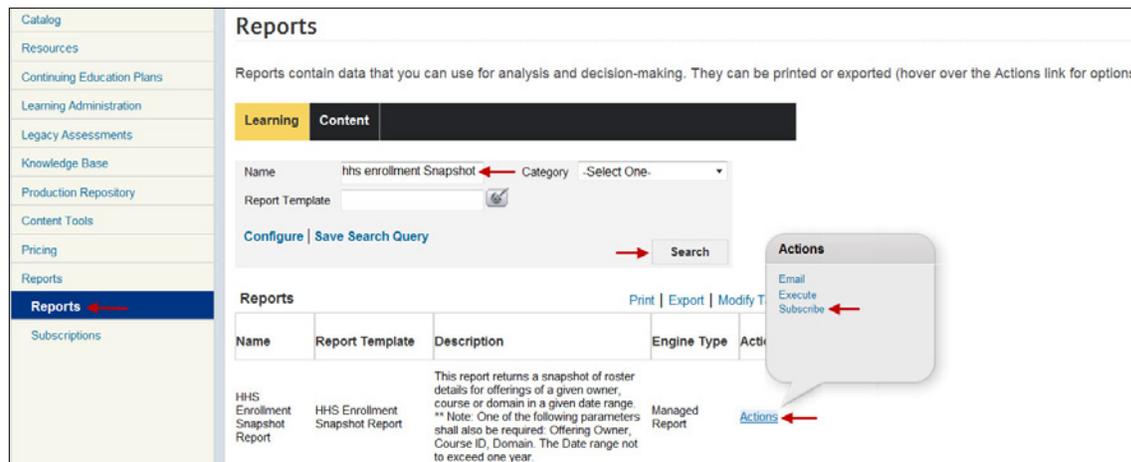
SUBSCRIBE TO A REPORT

Report subscriptions in the LMS allow reports to be emailed at scheduled intervals, to any valid email address. Those who receive the email do not need to log on or have access to the LMS in order to view the emailed report.

1. Click the **Admin Icon**.

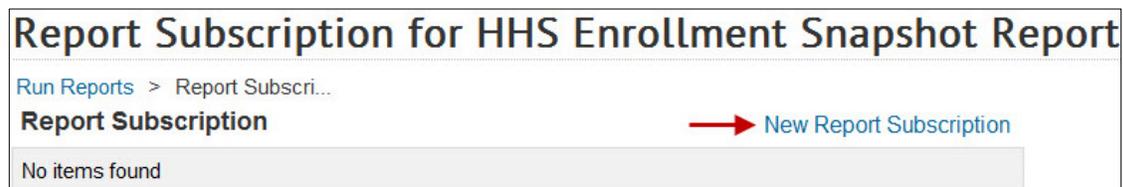


2. Click **Reports** in the left menu.
3. Enter the name of the report in the **Name field**.
4. Click the **Search button**.
5. Click the **Actions link** in the Actions column.
6. Click the **Subscribe link** in the Actions popup window.



7. Click the **New Report Subscription link**.

NOTE: Any previously created subscriptions for this report will be listed in the table.



8. Enter parameters for at least all fields that are required. These fields are labeled with red letters. It is recommended that you include yourself as a recipient to ensure the subscription is running at the designated intervals.

Report Subscription for HHS Enrollment Snapshot Report

[Run Reports](#) > [Report Subscri...](#) > [Report Subscri...](#)

Report Subscription Name*

Description*

Select one of the following:
Offering Owner

Course ID

Domain

From Date*

* Enter Date

To Date*

* Enter Date

To Email Address(es) (Enter one or more email addresses separated by semi-colons (;). Example: jdoe@email.com; msmith@email.com)*

 Character Limit:255

Subject*

Mail Text*
 Character Limit:255

Report Format*

Occurs Daily | Occurs Weekly Weekly Monthly

Every* week(s)

Mon Tue Wed Thu Fri Sat Sun

Frequency Once Every Hour(s)

Frequency-Once : a.m. p.m.

Start Time* :

Start Date*

NOTE: It is recommended that you include your name in the Mail Text section so that the recipients know who the report came from. Reports are sent automatically by the LMS and will not have the creator's information attached to it.

SELECTING THE OCCURRENCE OF A REPORT SUBSCRIPTION

Report subscriptions can be set up to send the report at various intervals of occurrence. They are Daily, Weekly and Monthly. Make your selection based on the information below.

Daily Occurrence – This option allows the report to be sent out by a specific number of days. The picture below shows a report subscription set to run every five days.

Occurs	<input checked="" type="radio"/> Daily	Occurs Daily	
	<input type="radio"/> Weekly	Every*	<input type="text" value="1"/> day(s)
	<input type="radio"/> Monthly		

Weekly Occurrence – This option allows the report to be sent out on specific days of the week on a weekly cycle.

Occurs	<input type="radio"/> Daily	Occurs Weekly	
	<input checked="" type="radio"/> Weekly	Every*	<input type="text" value="1"/> week(s)
	<input type="radio"/> Monthly	<input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	

Monthly Occurrence – This option allows the report to be sent out on a specific date within a month on a monthly basis.

Occurs	<input type="radio"/> Daily	Occurs Monthly	
	<input type="radio"/> Weekly	Every*	<input type="text" value="3"/> month(s)
	<input checked="" type="radio"/> Monthly	On*	<input type="text" value="1"/> day of the month

SELECTING THE FREQUENCY OF A REPORT SUBSCRIPTION

Reports can be sent at various frequencies however it is recommended to use the default setting of “Once” for all report subscriptions.

The Start Time should be set to off-peak hours. It is recommended that subscriptions be set to run before 8AM or after 5PM.

Following these guidelines for setting the frequency of a report subscription will help to improve the overall LMS responsiveness for all users during normal business hours.

Frequency	<input checked="" type="radio"/> Once	Frequency-Once	
	<input type="radio"/> Every <input type="text" value="1"/> Hour(s) ▾	Start Time*	<input type="text" value="07"/> : <input type="text" value="00"/> <input checked="" type="radio"/> a.m. <input type="radio"/> p.m.
		Start Date*	<input type="text" value="04/01/2015"/> 
		<input type="button" value="Preview Report"/>	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

The Start Date is the date that the report subscription becomes active. It is not the date that the report will be sent. Those parameters are determined in the occurrence section.

SAVING A REPORT SUBSCRIPTION

1. After all report subscription parameters have been entered, click **Preview Report** to see the report as it will appear. Verify that the report contains the correct data. If not, close the report and adjust the parameters that were previously entered.
2. Click **Save** to activate the report subscription. The report will be sent to email recipients entered at the times designated.



The screenshot shows a form for configuring a report subscription. On the left, under 'Frequency', there are two radio buttons: 'Once' (selected) and 'Every 1 Hour(s)'. To the right, there are fields for 'Start Time*' (07 : 00 a.m.) and 'Start Date*' (04/01/2015). At the bottom right, there are three buttons: 'Preview Report', 'Save' (with a red arrow pointing to it), and 'Cancel'.

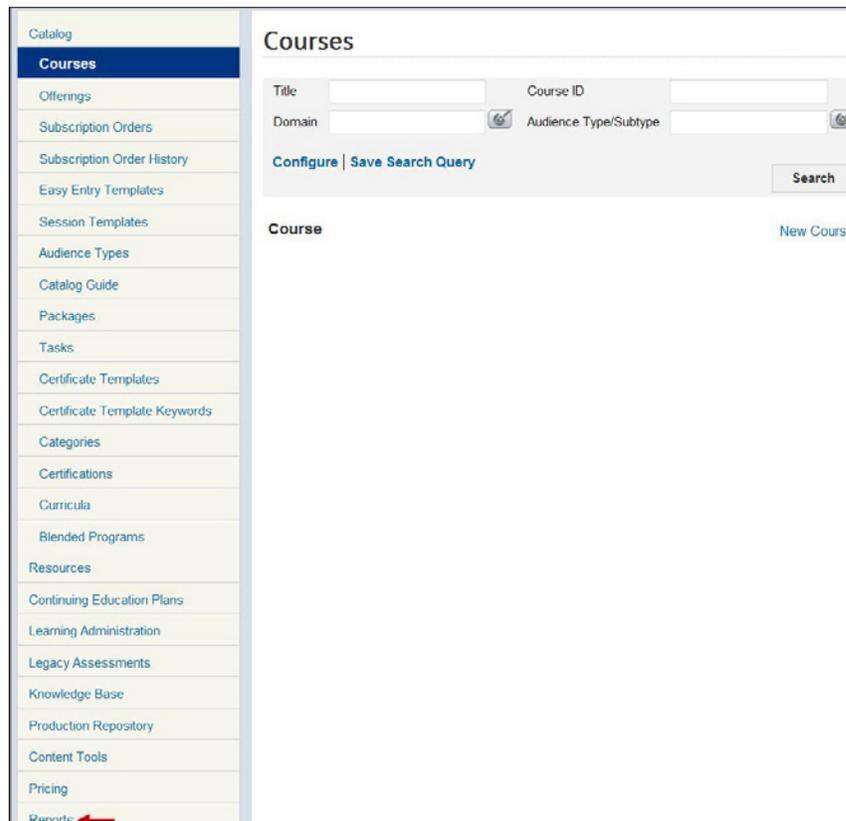
LOCATE AND EDIT A SUBSCRIPTION

Once a subscription is created, it can be edited or deleted at any time. Follow the instructions below to locate your subscriptions for edits or to delete them.

1. Click the **Admin Icon**.



2. Click **Reports** in the left menu.



3. Click Subscriptions in the left menu.

4. All the subscriptions you have created will be displayed in the Report Subscription table.
5. Click the **Actions** link in the Actions column associated with the report subscription.
 - c. Click **Edit** to return back the Report Subscription Parameters screen and make edits to the subscription.
 - d. Click **Delete** to cancel the subscription.

The screenshot displays the 'Report Subscriptions' page. On the left is a navigation sidebar with 'Subscriptions' selected. The main area features a header with 'Catalog' and 'Content' tabs. Below the header is a table with the following data:

Report Name	Subscription	Actions
HHS Enrollment Snapshot Report	Weekly Shapshot Report	Actions

A callout box highlights the 'Actions' column, showing 'Edit' and 'Delete' options with red arrows pointing to them.

HELPFUL INFORMATION

LINKS AND RESOURCES

- HHS Learning Portal log on page
<https://lms.learning.hhs.gov>
- HRSS Help Desk
Submit a help ticket:
https://nihohrweb.nih.gov:1010/WiTS_IntraHR/index.aspx
HRSS Hours of Operation: Monday through Friday: 8:00 AM to 4:30 PM
- NIH Training Center website
<http://trainingcenter.nih.gov>
- HRSS LMS Support website
(Tip sheets, Online Manuals, LMS Resources, etc.)
<https://hr.nih.gov/hr-systems/lms>

APPENDIX A – ORGANIZATION CODES

Organization (org) Codes are also referred to as SAC Codes

HN	All of NIH
HNA	(OD) Immediate Office of the Director
HNB	(NIAMS) National Institute of Arthritis and Musculoskeletal and Skin Diseases
HNC	(NCI) National Cancer Institute
HND	(NCCAM) National Center for Complementary and Alternative Medicine
HNE	(NCMHD) National Center on Minority Health and Health Disparities
HNF	(FIC) John E. Fogarty International Center for Advanced Study in the Health Sciences
HNG	(CSR) Center for Scientific Review
HNH	(NHLBI) National Heart, Lung, and Blood Institute
HNJ	(CC) Clinical Center
HNK	(NIDDK) National Institute of Diabetes and Digestive and Kidney Diseases
HNL	(NLM) National Library of Medicine
HNM	(NIAID) National Institute of Allergy and Infectious Diseases
HNN	(NIA) National Institute on Aging
HNP	(NIDCR) National Institute of Dental and Craniofacial Research
HNQ	(NINDS) National Institute of Neurological Disorders and Stroke
HNR	(NCRR) National Center for Research Resources
HNS	(NIGMS) National Institute of General Medical Sciences
HNT	(NICHD) National Institute of Child Health and Human Development
HNU	(CIT) Center for Information Technology
HNV	(NIEHS) National Institute of Environmental Health Sciences
HNW	(NEI) National Eye Institute
HN2	(NINR) National Institute of Nursing Research
HN3	(NIDCD) National Institute on Deafness and Other Communication Disorders
HN4	(NHGRI) National Human Genome Research Institute
HN5	(NIAAA) National Institute on Alcohol Abuse and Alcoholism
HN6	(NIDA) National Institute on Drug Abuse
HN7	(NIMH) National Institute of Mental Health
HN8	(NIBIB) National Institute of Biomedical Imaging and Bioengineering
HN9	(NCATS) National Center for Advancing Transitional Sciences

APPENDIX B - ENTERPRISE HUMAN RESOURCES INTEGRATION (EHRI) FIELDS

LMS REQUIRED FIELDS	EHRI REQUIRED FIELDS	NON REQUIRED FIELDS
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FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Item/Event Name*	Item or Event Title	Microsoft Excel 2007 for PC Users
Description	Description of the Item or Event entering Character limit: 1000	This class will expand the learner's knowledge of Microsoft Excel 2007.
Offering Start Date	Date the class started	MM/DD/YYYY
Ended/Completed On Date	Date the class ended	MM/DD/YYYY
Registration Date	Date the learner registered for the Item/Event	MM/DD/YYYY
Date Marked Complete*	Date the Item/Event was marked complete by an administrator	MM/DD/YYYY
Start Time (HH:MM)	Start time of the Item/Event	08:30
End Time (HH:MM)	End time of the Item/Event	16:30
Duration (HH:MM)	How many hours and minutes the class lasted	07:30
Delivery Type	Method the Item/Event was delivered in	Auditorium, Book, Coaching, Computer Laboratory, Conference, Correspondence Course, DVD/CD, Instructor led, Mentoring, Online Training, On the Job Training, Recorded Online Offering, Satellite, Scientific Laboratory, TeleConferencing, Traditional classroom, Video conferencing, Video Tape, Virtual Class, Web Cast, Workshop

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
ID*	Unique ID that identifies this entry	User Initials + Completion Date = JM09132008 where user = Jaime Martinez and Completion Date = 09/13/2008
Location	Location where course was taken. It could be a building or a city.	Examples: Executive Plaza North or Rockville
Marked Complete by	Search for the username of the person entering this record (yourself).	At first your username will display but once the record is saved the field will display your name.
Continued Service Agreement Required Indicator (1231)	Indication that an employee is obligated to remain in service as a stipulation for taking the training course.	N => No NA => Non Applicable Y => Yes
EHRI: Training Accreditation Indicator (1102)	Indicates that the course has been accredited by an accreditation body.	N => No NA => Non Applicable Y => Yes
Training Accreditation Organization Type (1103)	The name and description of the accreditation organization	Leave empty if unknown.
Course ID From Vendor (1105)	The course ID as assigned by the vendor	Leave empty if unknown.
EHRI: Training Source Type (1120)	Source of the training which has been completed by the employee.	Foreign Governments and Organizations; Government External; Government Internal; Government State/Local; Non-government
EHRI: Default Training Purpose (1122)	Code representing the purpose of the training completed by the employee	Develop Unavailable skills; Future Staffing Needs; Improve Present Performance; Mandatory Training; New Work Assignment; Program/Mission Change; Retention

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
EHRI: Default Training Type (1124)	Code for the type of training which has been completed by the employee.	Acquisition; Adult Basic Education; Agency Required Training; Basic Computer Training; etc. <i>There are more options available in this drop-down</i>
EHRI: Training Credit (1126)	Amount of academic credit hours or continued education units earned by the employee for the completed training. This should match either credit hours or CPE hours. This value is used for reporting to EHRI.	If amount of credit is known, input the number. If not available or not applicable input 0.
EHRI: Training Credit Designation Type (1127)	Code for the type of academic credit hours or continued education units earned by the employee for the completed training course.	Continuing Education Units, Graduate Credit; NA; Post Graduate Credit; Undergraduate Credit
EHRI: Training Delivery Type (1129)	Code for the type of training delivery for the training course completed by the employee.	Blended; Conference or Retreat; Correspondence; Instructor Lead; On the Job; Technology based
EHRI: Training Credit Type Code (1131)	Code representing the type of credit hours the employee received for the completed training.	CPEs; Continuing Education Unit; NA; Quarter Hours; Semester Hours
Instructor Competencies (1200)	Description of areas the instructor should be competent in to teach the class.	If don't have any particular information on competencies for the instruction, leave empty.
Multilingual Course (1201)	List of alternate languages for the course	Input the name of the other language the course was provided in. If not known or if it wasn't delivered in another language, leave empty.
Internal or External Course (1202)	Determine if the course is external or internal to the organization	External, Internal
Training Certification Type (1211)	Enter the type of certification earned after completing the course.	If any available enter the name of the certification, if don't know or if no certification was earned, leave empty.

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
Course Development Cost (1220)	The cost for developing the course. This only applies for internally developed courses the Federal Organization sponsored.	If no cost were incurred, leave empty .
EHRI: Estimated Training Tuition and Fees Cost (1221)	The cost of the training tuition and fee for training completed by the employee that was paid for by the Federal Government.	Enter the total cost paid for taking the course, if none available or no cost were incurred, input 0 .
EHRI: Training Materials Cost (1222)	Cost to the Government for the training materials used during the training unit completed by the employee. This includes all direct costs associated with purchasing the training materials used by the employee that is in addition to the tuition cost. It can include but is not limited to costs of supplies, cost of equipment, and cost of software used by the student during the training event.	Enter the total cost of training materials, if none available or no cost were incurred, input 0 .
EHRI: Continued Service Agreement Required Indicator(1231)	Indication that an employee is obligated to remain in service as a stipulation for taking the training course.	N => No NA => Non Applicable Y => Yes
EHRI: Training Duty Hours (1101)	Number of employee duty hours the employee used to complete the training unit.	Enter the amount of duty hours, if none available or none duty hours were used, input 0 .
EHRI: Training Non Duty Hours (1102)	Number of employee non-duty hours for the completed training course.	Enter the amount of non duty hours, if none available or none duty hours were used, input 0 .
EHRI: Training Per Diem Cost (1103)	Cost of the per diem (meal, lodging, misc. expenses) for training completed by the employee that was paid for by the Federal Government.	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no per diem was allotted, input 0.00
EHRI: Training Travel Cost (1104)	Cost for the travel, excluding per diem, for training completed by the employee that was paid for by the Federal Government	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no travel cost was allotted, input 0.00

FIELD NAME	DESCRIPTION	SAMPLE ACCEPTED VALUES
EHRI: Training Nongovernment Contribution Cost (1105)	Cost contributed by the employee or other non-government organizations for the training completed by the employee.	Should be entered as a dollar amount for the individual, with two decimal places. If unknown or if no nongovernment contribution was allotted, input 0.00
EHRI: Training Travel Indicator (1106)	Indicates if the employee traveled to attend the training course.	Y=Yes N=No, NA=Non Applicable
EHRI: Continued Service Agreement Expiration Date (1230)	The date to which an employee is obligated to remain in service as a stipulation for taking the training course.	If date applicable, enter it in the following format: MM/DD/YYYY. If not applicable or if unknown, enter NA .
Continuing Education Credits	If a field of study has been set up in the LMS for continuing education credits, you will be able to select it here.	Choose from availabilities in the LMS
Learners	Specify the learner(s) to whose transcript(s) this item should be recorded	Name, Score, Grade, Completion Status
Competencies	Specify whether any competencies were gained by the completion of the class	Choose from availabilities in the LMS and indicate proficiency level attained

